SPF SIG INSTRUMENTS

Grant Management Reporting Tool

Prevention Management
Reporting and Training System

USER MANUAL

VERSION 1.1
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INTRODUCTION

What is the purpose of the SPF SIG MRT system?

The SPF SIG MRT system is a web-based system designed to help your organization or help you use SAMHSA's Strategic Prevention Framework (SPF). Each SPF step (Assessment, Capacity, Planning, Implementation, and Evaluation) is displayed as a link (or button) at the top of the page. Required Progress Reports will be submitted through SPF SIG MRT. You will work through each of these SPF steps to populate your quarterly Progress Report. In addition to submitting reports, you will be able to use SPF SIG MRT as a way to manage your grant.

TIPS FOR USING THE SYSTEM EFFECTIVELY

Recommended Computer Settings

Screen Resolution

You will get the best screen layout if you set your PC monitor settings to 1024 X 768 pixels or larger. If your screen resolution is smaller (800 X 600 pixels) everything on the screen will appear larger. If you use 800 X 600 pixels, you will have to scroll more both up and down and left and right to access all the data fields.

To change your PC monitor settings, right click on the Desktop background and select Properties. Next, click on the Settings tab and move the Screen Resolution scroll bar to the right (towards ‘more’) to select 1024 X 768 resolution. Click the OK button at the bottom of the window to make the change effective.

Web Browser

The web browser supported by SPF SIG MRT is Microsoft Internet Explorer (IE). Mozilla Firefox, Netscape, Safari and other browsers may not be supported by SPF SIG MRT. They may function but not to design specifications. We recommended users have the latest version of IE installed on their computer along with the updates provided by Microsoft (which are released periodically).

Pop-Up Blocker

Modern computer security technology and usability features development have lead to pop-up blocking. Although this new feature of internet browsers, toolbars, and other 3rd party managing software blocks hazardous and annoying pop-up, sites likes SPF SIG MRT require pop-ups to be able to function. If your pop-up blocker is enabled, there is a possibility that SPF SIG MRT may not function or appear properly. You should either disable the pop-up blocker while using SPF SIG MRT (while remembering to enable it, if desired, when not in SPF SIG MRT) or create exceptions for the pop-up blocker. This is cumbersome but may be easier than making exceptions to the pop-up blocker.

To create exceptions for the pop-up blocker, open your Internet Explorer browser window. Once the browser is open click the toolbar options “Tools” and then go to “Internet Options”. After the “Internet Options” window is available you will want to click on the “Privacy” tab at the top of the window. You will notice while on the “Privacy” tab, at the bottom will be a section on Pop-Up Blockers. If your “Block Pop-Ups” checkbox is checked, click on the “Settings” button. You can now add the SPF SIG MRT link to the “Allowed Sites” list which the pop-up blocker will ignore when trying to block pop-ups from SPF SIG MRT.

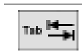
*Notes: These are instructions for Internet Explorer 7.0 and may be different for other Internet Explorer versions.

Application Navigating

SPF SIG MRT is set up in such a fashion that moving from top to bottom of each page and section to section on the Menu is the best approach to using the system. You must start at Assessment, filling in all of the information for that module (all pages and submenus), before moving on to Capacity and the other Menu items. Continuing in this manner will ensure that all of the forms in the systems have enough information to function correctly. If certain forms have not been completed you may have difficulty completing other forms. You also must save each form before moving onto the next form by clicking the  (**Save**) button located at the bottom of the form.

Computer Keys

While entering information into a form, several keys are helpful for moving the cursor from one information box (called a data field) to another. The table below summarizes those keys:

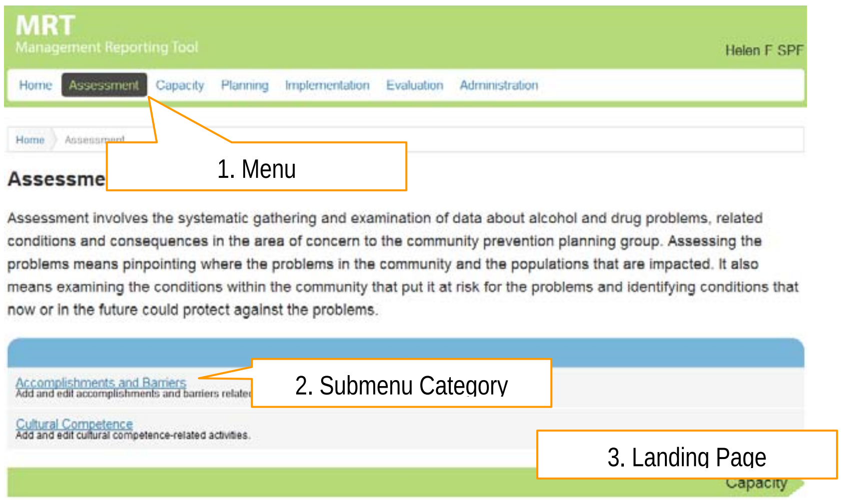
Key	Description	Function
	Mouse cursor	Points to desired location
	TAB key	Moves the cursor to the next data field
	SHIFT key + TAB key	Moves the cursor to the previous data field
	Control (CTRL) key	Enables blocked material to open (due to pop-up blocker)
	MOUSE	Moves the cursor by pointing and clicking

Entering data into SPF SIG MRT can be made easier by using the “TAB” key on the keyboard. The “TAB” key advances the cursor to the next data field. You can go from the current field to the previous field by holding “SHIFT” and pressing “TAB” (SHIFT + TAB). You can also navigate through the fields by using the mouse.

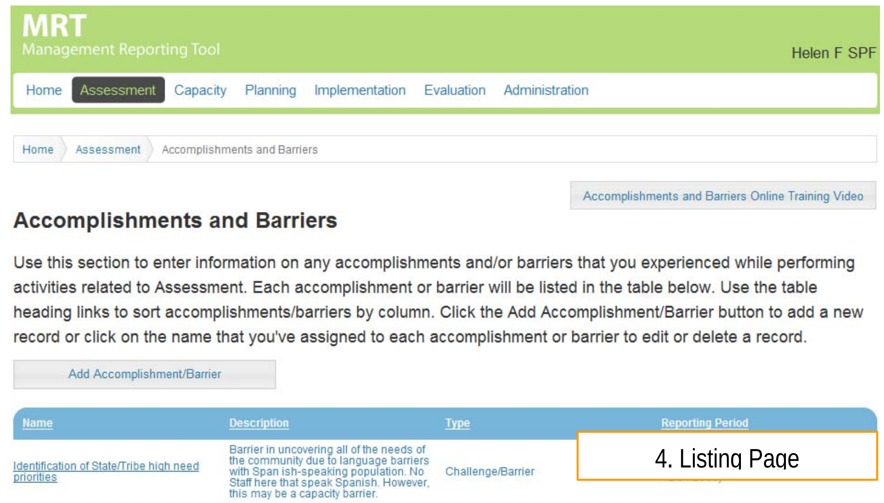
Menu Information

You can access the six (6) main areas by using the Menu or the links from the Home page. The Menu for SPF SIG MRT is located near the top of the screen. The Menu includes links to the six (6) main areas of SPF SIG MRT. Clicking on a link brings you to the corresponding page (called a Landing Page) which displays the submenu modules for that area as links to access the module. Once a module is selected from a Landing Page, the module's Listing Page will be available to add new data or modify existing data. (For more information on Landing Pages and Listing Pages, see the Landing Pages and Listing Pages sections of this manual.)

1. Menu	Constant (unchanging). Available at all times.
2. Submenu Category	Varies depending on which Menu link is selected.
3. Landing Page	Varies depending on which Menu link is selected. Displays the Submenu.
4. Listing Page	Varies depending on which Submenu category link is selected.

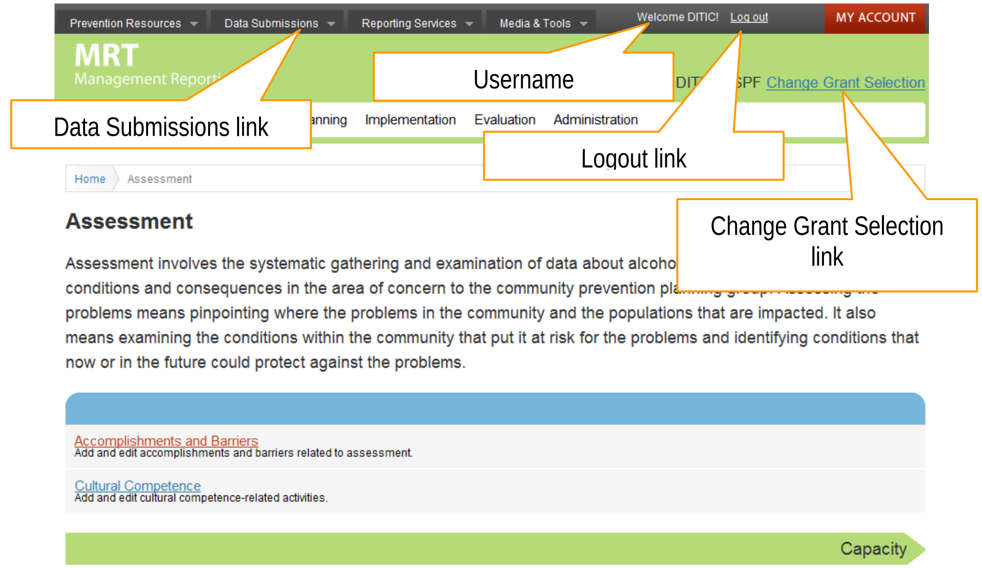


Screenshot displaying the Menu and a Landing Page



Sample screenshot displaying a Listing Page

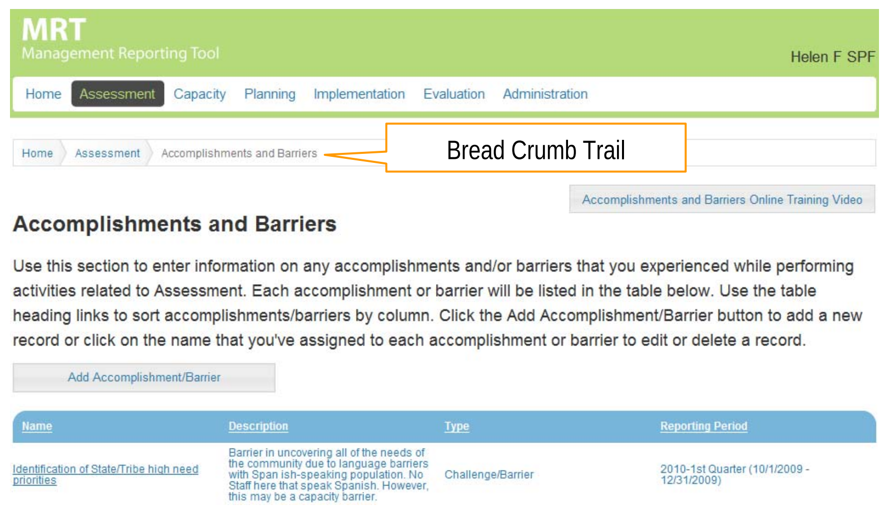
Above the Menu provides links to Logout of the system or to Change Grant Selection. The Grant is listed as well as the user currently logged into MRT SPF SIG.



Screenshot displaying main menu

Bread Crumb Trail

A Bread Crumb Trail is provided to indicate where you currently are in the system. The links provided in the Bread Crumb Trail allow you to go to the previous page you were on.



Sample screenshot displaying a Bread Crumb Trail

Landing Pages

A Landing Page is the main page of each of the main sections, or modules (Assessment, Capacity, Planning, Implementation, Evaluation, and Administration) within SPF SIG MRT. The Landing Page contains the links for each module (Submenu category) within the section. No data is entered on a Landing Page.

Screenshot displaying a Landing Page

Listing Pages

A Listing Page is the main page of each module (Submenu category) within the main sections of SPF SIG MRT. A Listing Page contains either all data that have been entered for the module or a portion of the data that has been entered with links to view/edit the previously recorded data in its entirety. No data is entered on a Listing Page.

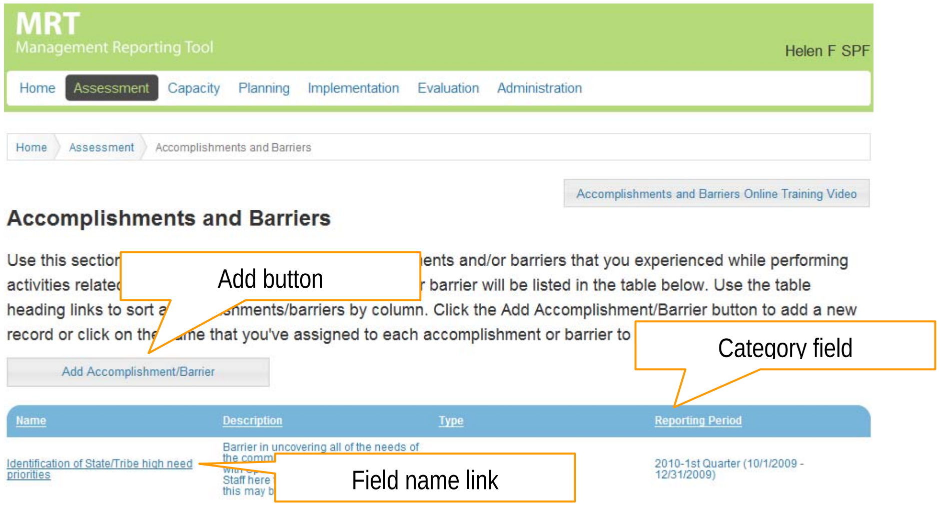
There are three types of Listing Pages:

1. Grid View
2. Hierarchy View
3. Single Form View

Grid View:

The Grid View displays the data in tables. Multiple data is entered and saved when a Grid View Listing Page is available. Specific pieces of data will be displayed within the grid based on the fields within the Edit Form (see the Edit Forms section of this manual for details on the Edit Form).

- An Add (Add) or Create (Create) button will be available above the grid to create multiple data entries (records).
- Clicking on a field name link located to the left within the grid will allow you to view/edit the data.



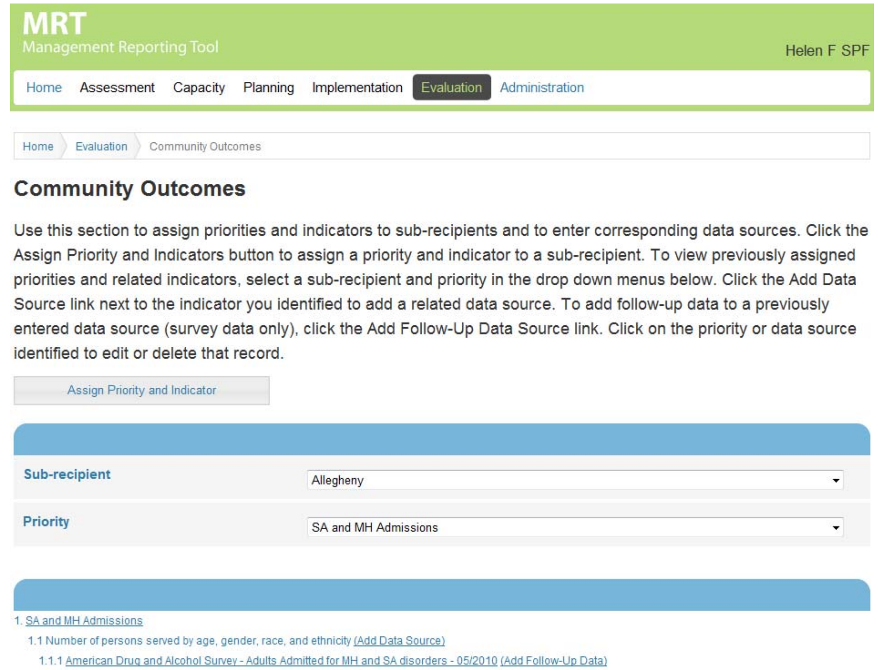
Sample screenshot displaying a "Grid View" Listing Page

Tips

- Clicking on a field name in a Category field (e.g., Name) will allow you to sort through your data in ascending or descending order.
- If you are entering data for the first time, the grid will appear empty.

Hierarchy View:

A Hierarchical View is used when there is a 'Parent/Child' relationship. Looking at the example, it shows the parent (the Priority) and the child (the Indicator). The need to link a child (Indicator) to a parent (Priority) adds complexity to the process of adding and searching. The hierarchical view was designed to simplify these tasks.

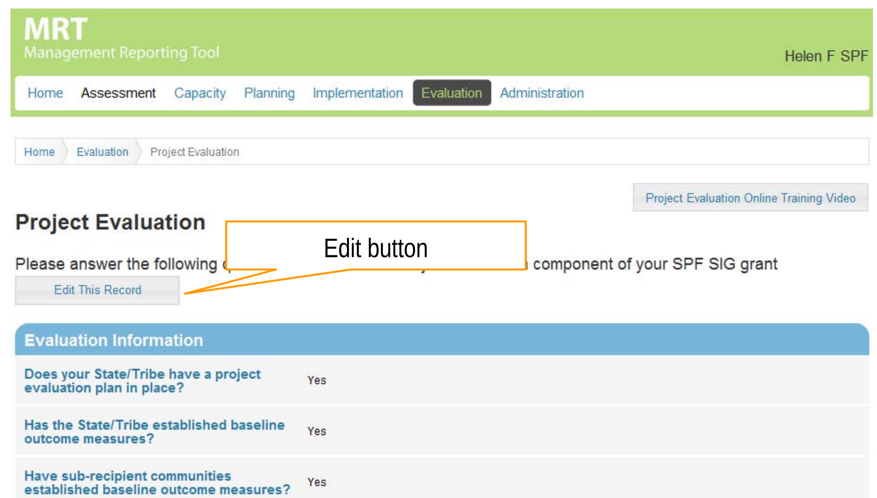


Sample screenshot displaying a "Hierarchy View" Listing Page

Single Form View:

The Single Form View is used when the data entered is updated periodically. Only one (1) form is available and edited. The Single Form View displays the data fields on the Edit Form (see the Edit Forms section of this manual for details on the Edit Form).

- An Edit This Record (**Edit**) button will be available to modify the data.

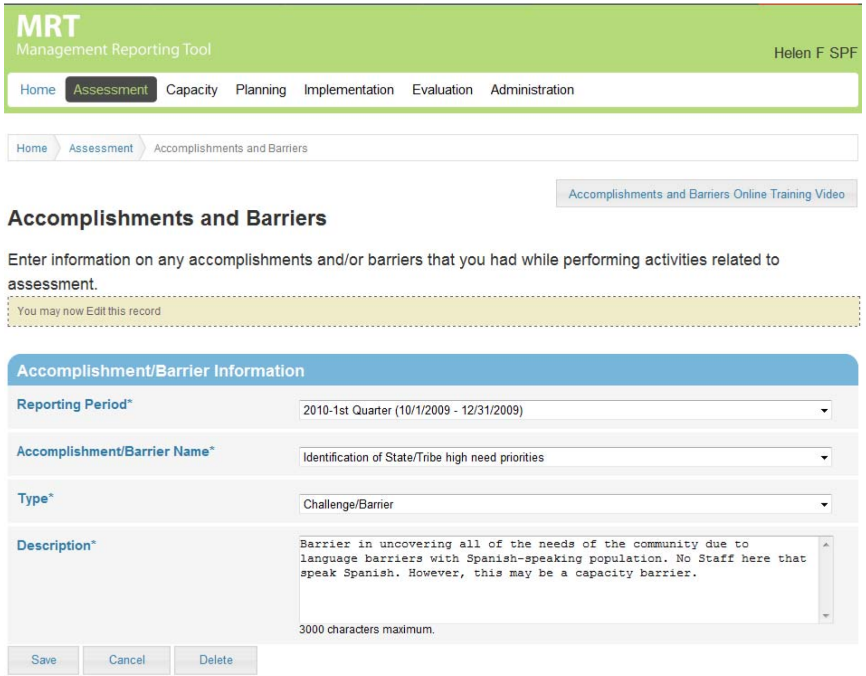


Sample screenshot displaying a "Single Form View" Listing Page

Edit Forms

The Edit Form contains the fields for entering and editing data.

- If you clicked the (**Add**) or (**Create**) button to enter new information into a form, the Edit Form data fields will be blank.
- When selecting a field name link to view existing data, the Edit Form data fields will display the data that was entered/selected previously. These fields may be modified, if needed.



Sample screenshot displaying an Edit Form for existing data

Data Fields and Buttons

In SPF SIG MRT there are several fields, boxes, and buttons that are used to collect, store, and organize data.

Here are some examples:

Type	Preview/Description
Text Field (aka text box)	
Drop Down List (aka dropdown menu)	Select One
Radio Buttons	selected not selected
Check Boxes	checked unchecked
Required Fields	**Date Established*** (mm/dd/yyyy)
Calendar	(See the Calendar Feature section for instructions.)

If a required field does not have data entered into it and you try to save the form you will receive a message that informs you of the field vacant of data and you will not be able to save that form until that field has data. Some or all of the fields may be required in order to save a form. Those fields that are required are **bold** and marked with an asterisk (*).

Tips

- You must click the (Save) button before moving on to the next section in the system.
- To select multiple data options at one time from a list box, hold the control (CTRL) key on your keyboard while simultaneously left clicking the mouse on any of the data options that you'd like to include in your entry.

Edit Form Buttons

Information is entered and edited through the Edit Form. The table below summarizes the buttons used to enter and edit data into an Edit Form.

Button	Description
Add Create	Must be selected to add new information to an Edit Form
Edit This Record	Allows the Edit Form fields to be “open” for modification
Delete	Removes the information (data) from the SPF SIG MRT database
Save	Adds the information (data) to the SPF SIG MRT database
Capacity.	Cancels the Add or Edit without saving the information (data) entered

Additional Feature Buttons

Within the MRT Application are icons offering additional help to the user. Click on one of the icons to receive the help needed.

	Provides information on the desired topic

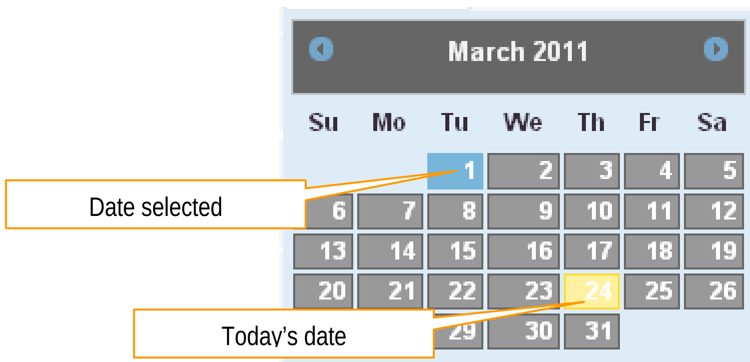
Below are some additional buttons that may appear within a form:

Submit	Forwards the approved information to the appropriate parties for further consideration.
Export	Downloads the selected file into the desired format.

Calendar Feature

Dates can be entered in two different ways: 1) typing the date directly into the field or 2) using the **Calendar** feature. The **Calendar** can be used as an alternative option to entering a date directly into a date field.

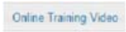
1. When you select a date field, a calendar displaying the current month and year will display below the date field.
2. Select the date by clicking on a number within the calendar.
3. The calendar will close and the date will appear within the date field.



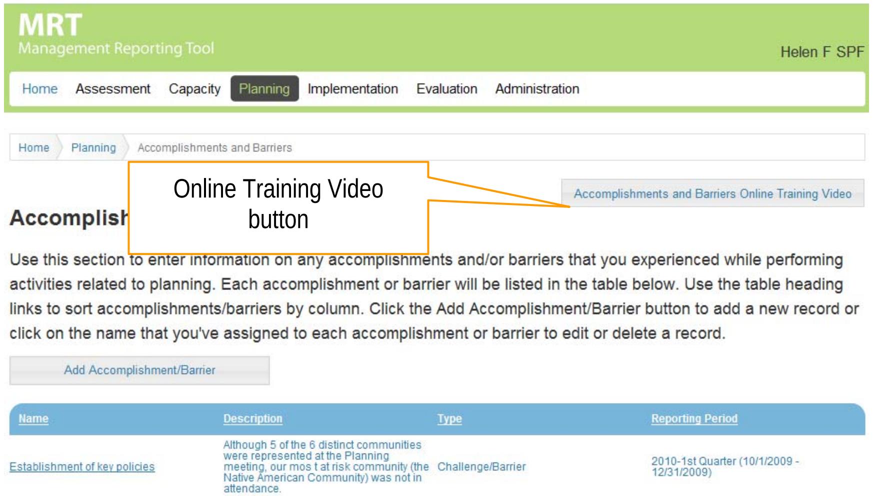
> *Note: You can also change the month by clicking the arrows to the right and left of the Month/Year. Clicking the arrow will take you to the previous month whereas clicking the arrow will take you to the next month.
>
> For instance, the current month displaying is March. Clicking the arrow will take you to February whereas clicking the arrow will take you to April.

Training Videos

The MRT system has training videos available to watch in addition to using this manual. These videos are broken down into the different sections of the system, and many sections have access to its respective training video. Follow the instructions below to view a training video.

1. To view the training video of the section you are currently in, click the 

(**Online Training Video**) button.
2. The video will open in a new window.
3. To close the training video window, click the X on the top-right corner of your screen.



Sample screenshot displaying Accomplishments and Barriers listing page

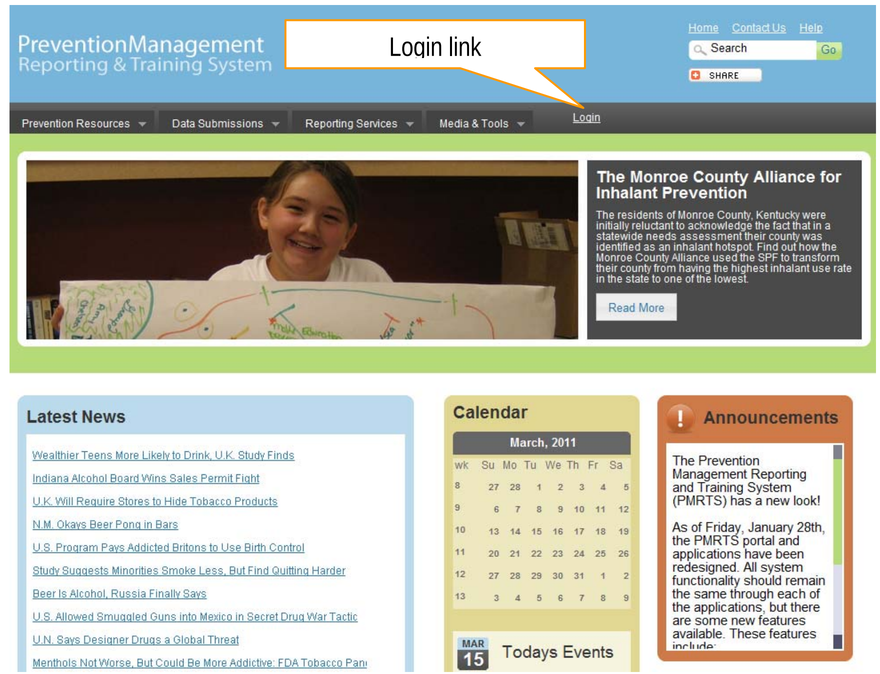
LOGIN PROCEDURE

Connect to the Internet using an internet browser (e.g., Internet Explorer).

Screenshot displaying the URL in Internet Explorer – this is a partial screenshot

In the Address (location) box, type in the following address and press Enter:

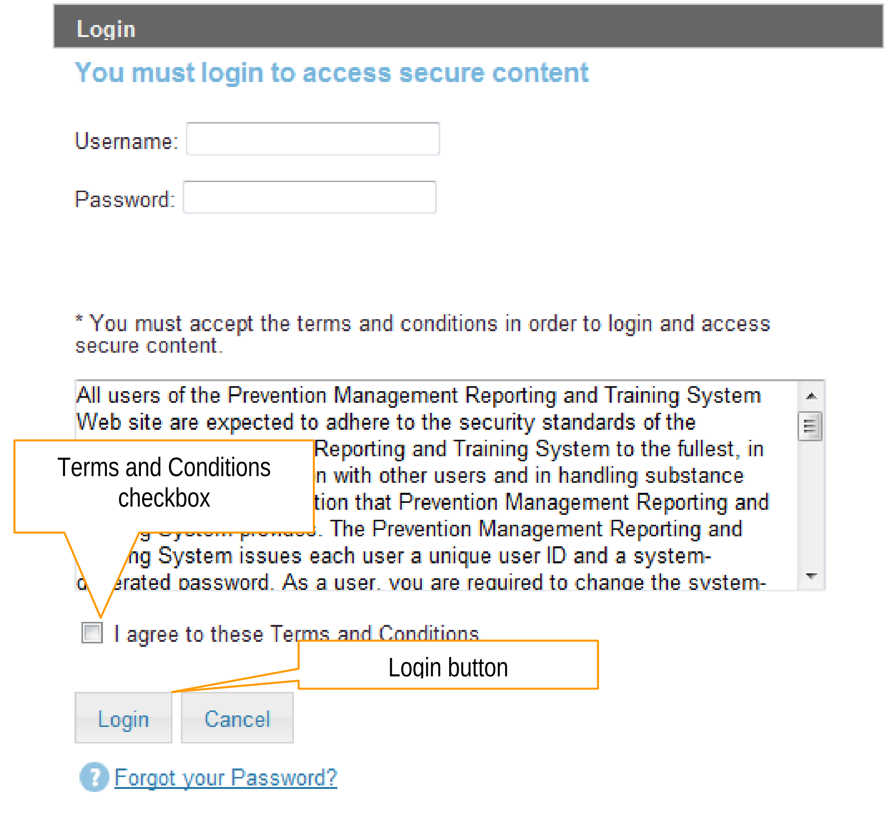
https://www.pmrts.samhsa.gov/pmrts/



Screenshot displaying the PMRTS Home Page – this is a partial screenshot

To access SPF SIG MRT, you will login through the Prevention Management Reporting and Training System website.

1. Click the Login (**Login**) link located at the top right hand corner of the screen.



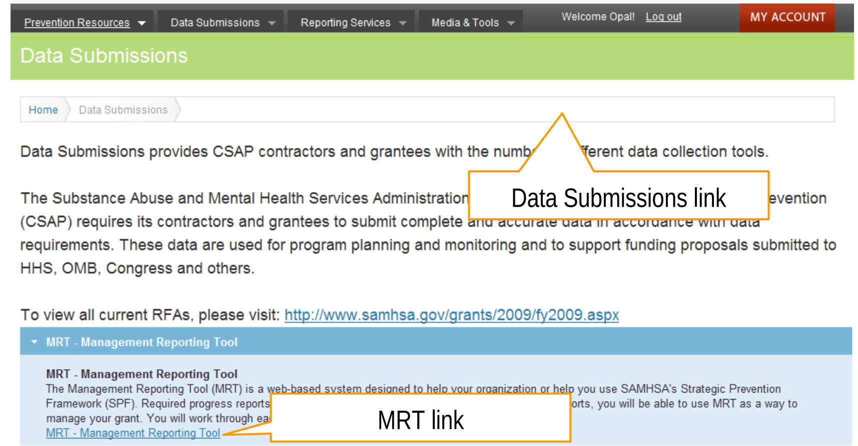
Screenshot displaying the Login page

2. Type the login name in the **User Name*** field.
3. Type the password in the **Password*** field.
4. Click the box that states "**I agree to these Terms and Conditions**".
5. Click the Login (**Log In**) button.
   *__Note__: To cancel the login process, click the Cancel (**Cancel**) button.

Tips

- The **User Name** is NOT case sensitive.
- The **Password** IS case sensitive.

6. Click Data Submissions (**Data Submissions**) from the Prevention Management Menu.
7. From the *Your available systems:* box, click the MRT - Management Reporting Tool (**MRT – Management Reporting Tool**) link.

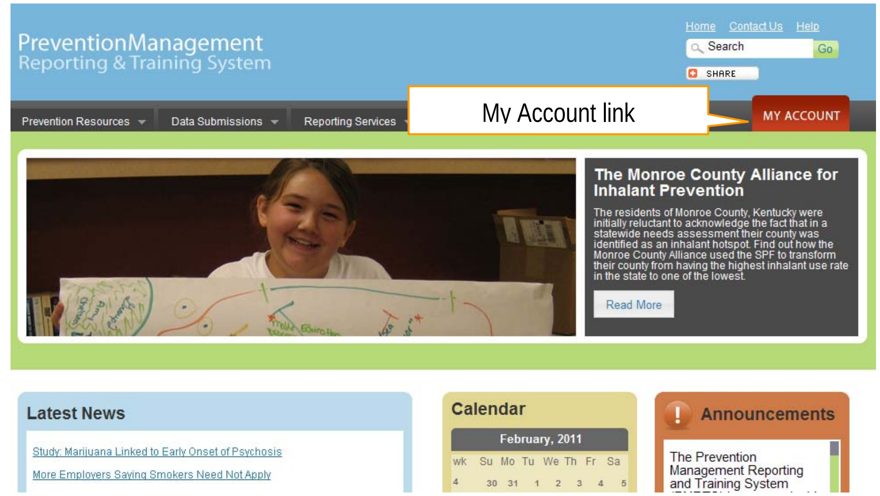


Screenshot displaying the Prevention Management Data Submissions Landing Page

Change Your Password

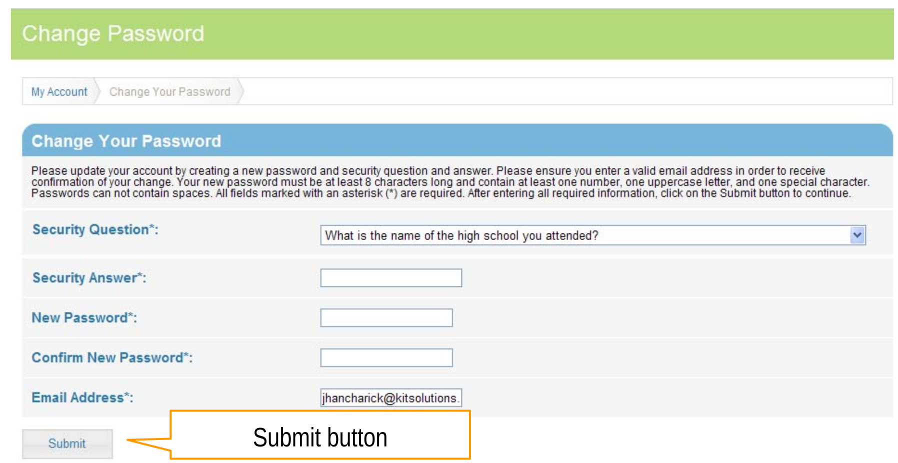
The Change Your Password feature allows a user to change the password for the account he or she is currently logging into the system with.

1. To change your password, begin by clicking the MY ACCOUNT (**My Account**) button from the Prevention Management Reporting and Training System main menu.
2. Click the Change Your Password (**Change Your Password**) link..



Screenshot displaying the Home page – this is a partial screenshot

3. Select a **Security Question*** from the dropdown list.
   *Note: The Security Question will be used when using the Forgot Password feature to ensure the user requesting a password is legitimate.
4. Enter your answer to the selected security question in the **Security Answer*** field.
5. Type the password you would like to use in the **New Password*** field.
6. Retype the password in the **Confirm New Password*** field.
7. Verify or update the email address in the **Email Address*** field.
8. Click the Submit (**Submit**) button.



Sample screenshot displaying the Change Your Password page

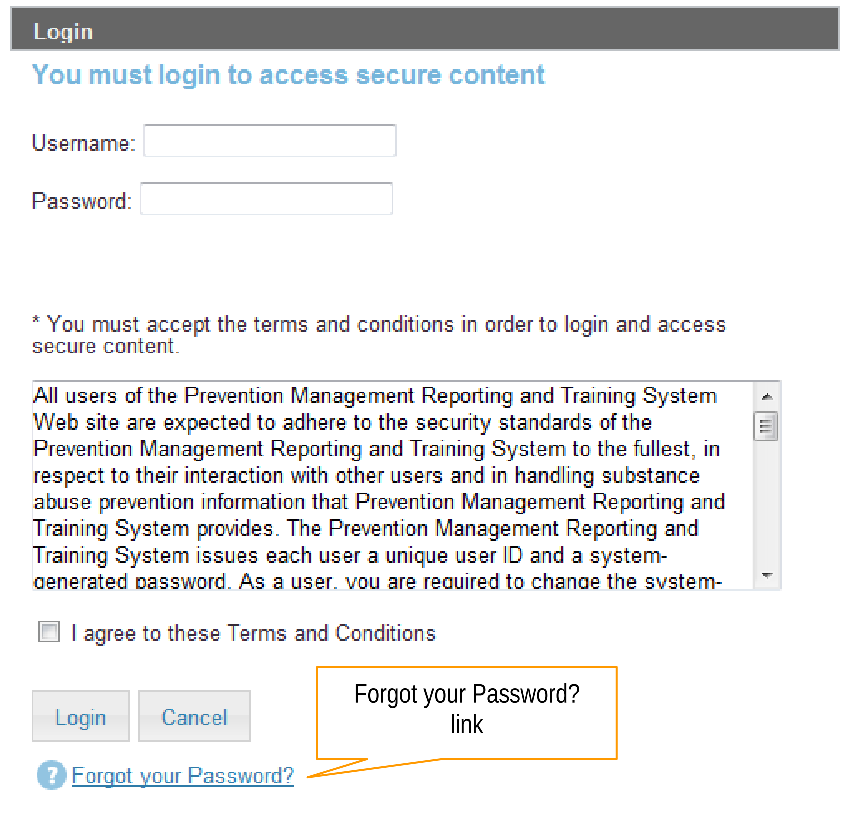
Tips

- The **User Name** is NOT case sensitive.
- The **Password** IS case sensitive. The Password must fill the following requirements:
    Minimum length: 8 characters
    At lease one (1) upper case letter
    At least one (1) lower case letter
    At least one (1) of the following special characters: !@#$%^&
- You will be required to change your password every 90 days.

Forgot Your Password?

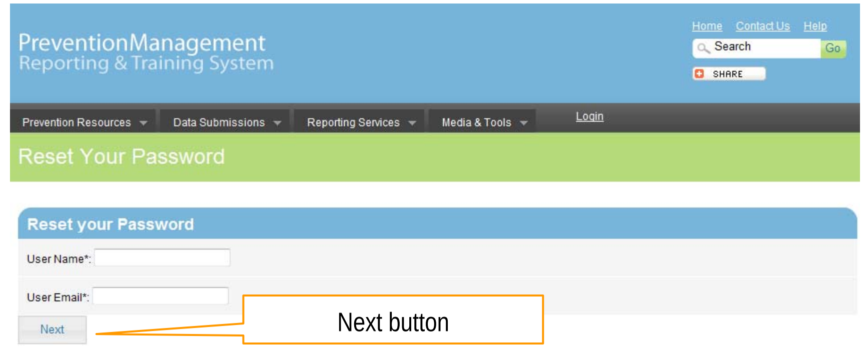
If you are unable to log into SPF SIG MRT due to forgetting your password, you can retrieve this information at the login page.

1. On the Login page, click the Forgot your Password? (Forgot your Password?) link.



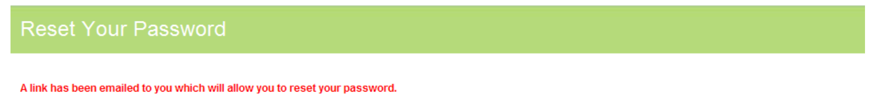
Screenshot displaying the Login page

2. Type the login name in the **User Name*** field.
3. Type the email address of the user who is associated with the User Name in the **User Email*** field.
   *__Note__: This must be a valid email address.
4. Click the (**Next**) button.
5. On the next screen, answer the Security Question.
6. Click the (**Next**) button.



Screenshot displaying the Forgot Your Password? page

7. A new temporary password will be sent to the email address that is associated with the User Name.



Screenshot of the Forgot Your Password? confirmation

Tips

- If you currently do not have an account you will not be able to use the Forgot Password feature.
- If you do not receive a new temporary password, first check your junk mail and spam folders. If you still did not receive a temporary password contact Support at 1-888-DITIC-4-U (348-4248). The following reasons may be the cause: your email address has changed since the account was created, you mistyped the email address, or you are unable to receive emails from Support.
- Please add the following domain to your email safe list: @kitsolutions.net to ensure you receive emails from Support.

Account Locked

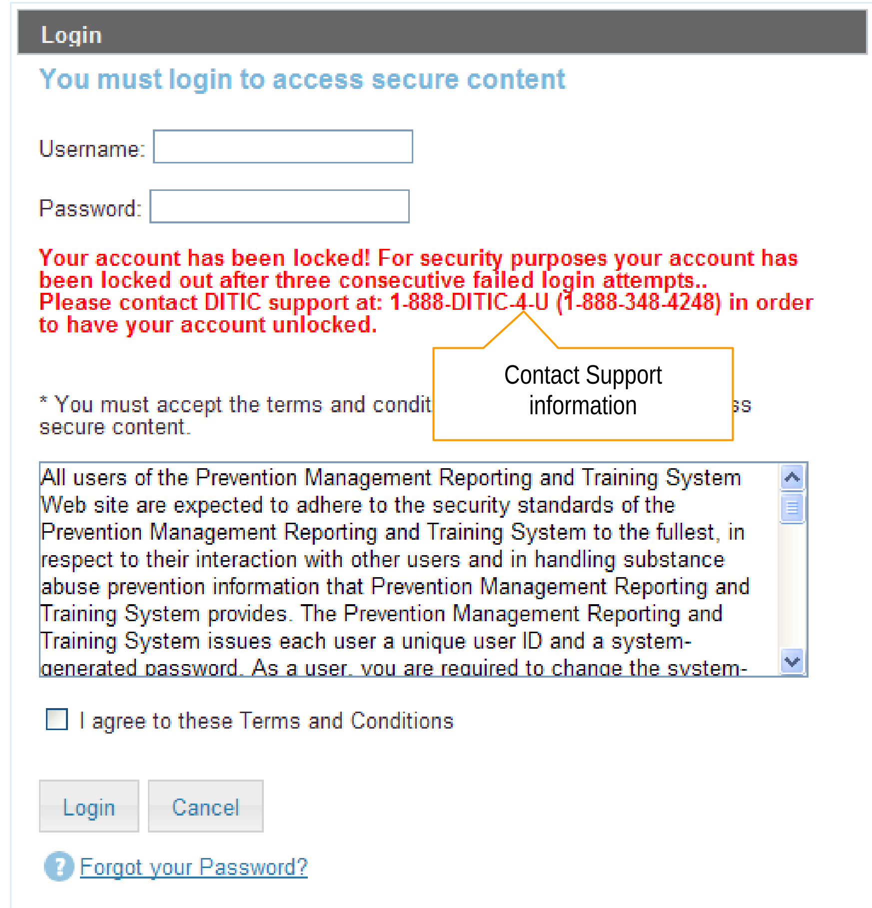
If you attempt to log into the system unsuccessfully three (3) times, you will be locked out of your account. Please contact Support to have your account unlocked.

SUPPORT CONTACT INFORMATION:

- 1-888-DITIC-4-U (348-4248)
- DITICSupport@kitsolutions.net
- Use the Contact Form on the Support Site: http://kitusers.kithost.net/support/diticsupport

Once your account is unlocked you will receive an email:

1) The email informs you that your account has been unlocked. Subject line will read: User Account has Been Unlocked

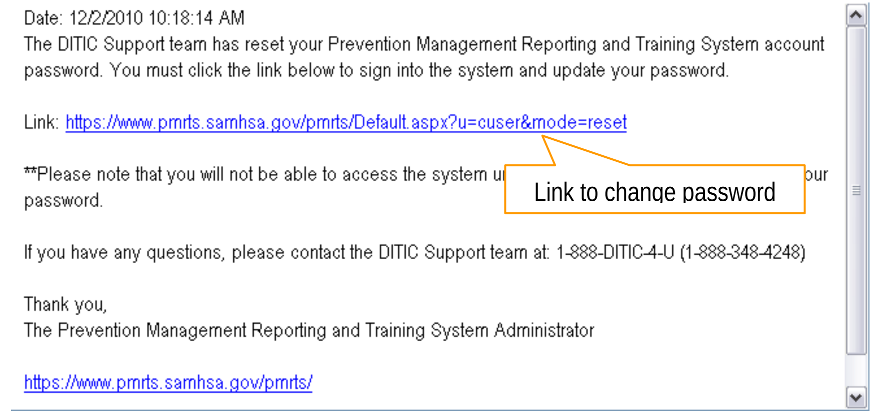


Screenshot displaying the Account Locked screen

When your account is unlocked you can request Support to reset your password if you do not remember your current password.

Once your password has been reset you will receive an email:

1) The email provides you a link to reset your password. Subject line will read: Password Has Been Reset

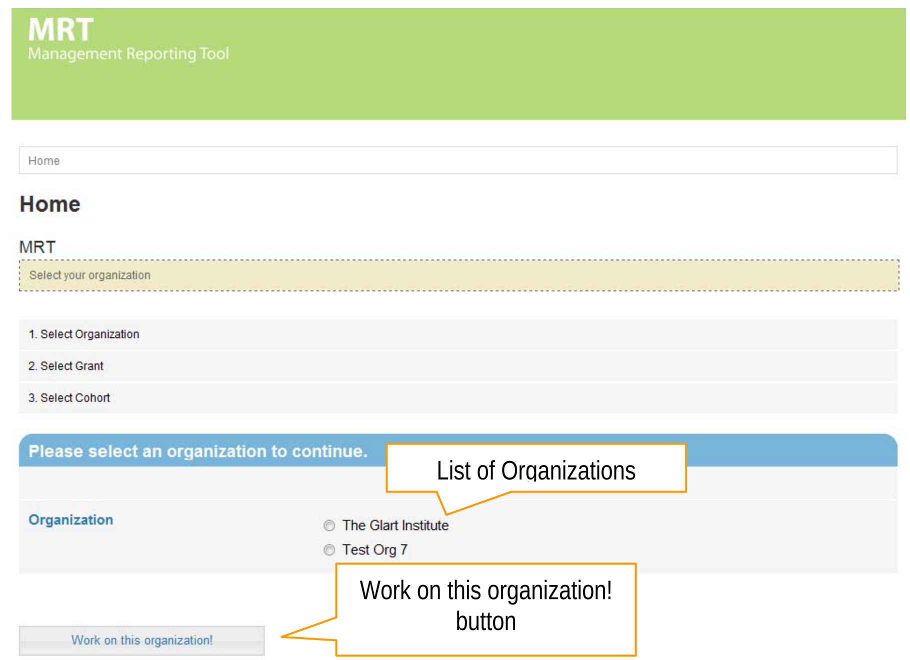


Screenshot of the Password Reset email – this is a partial screenshot

Current Organization

If you work in multiple organizations, you will have to select the organization from the list of Organizations. *This screen will not appear if you work at one (1) organization.*

1. Select the radio button next to the appropriate organization name.
2. Click the Work on this organization! (**Work on this organization!**) button.

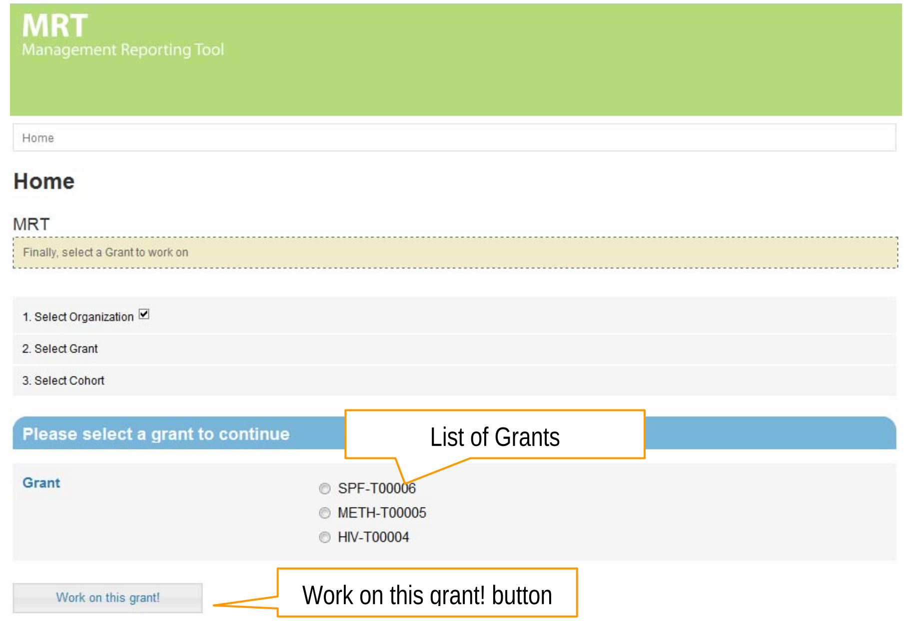


Screenshot displaying the Organization selection page

Grant Selection

If your organization works with multiple Grants, you will have to select the Grant name from the list of Grants. *This screen will not appear if you work on one (1) Grant.*

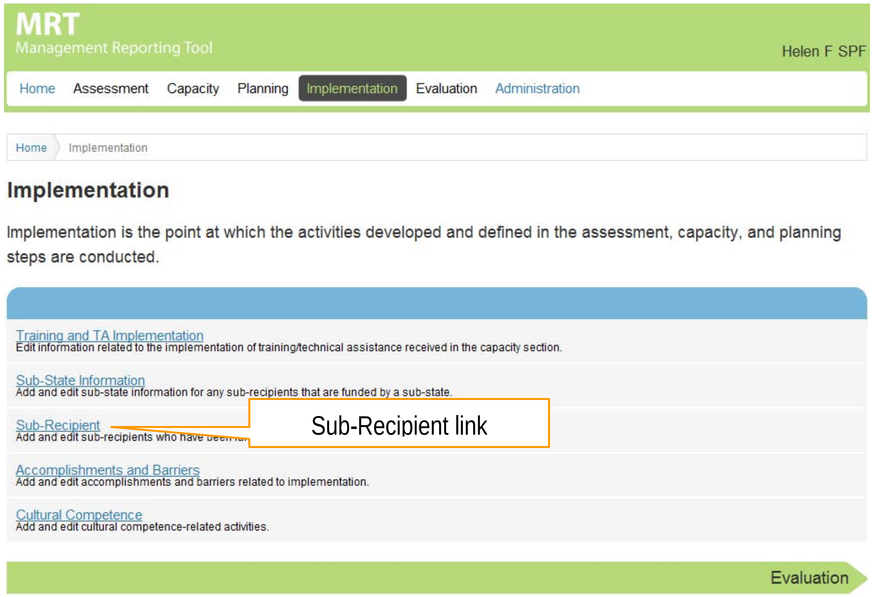
1. Select the radio button next to the appropriate Grant.
2. Click the Work on this grant! (**Work on this grant!**) button.



Screenshot displaying the Grant selection page

Within the Implementation module, a user is able to perform the following tasks:

1. Enter, edit and delete Sub-Recipient.



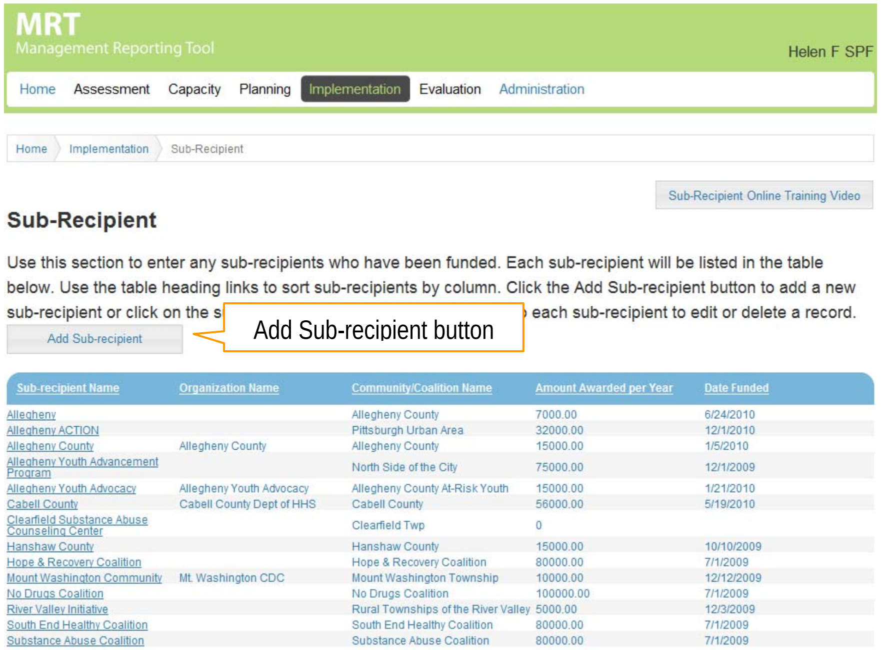
Screenshot displaying the Implementation Landing Page

Sub-Recipient

The Sub-Recipient module allows the user to add Sub- Recipients that are funded.

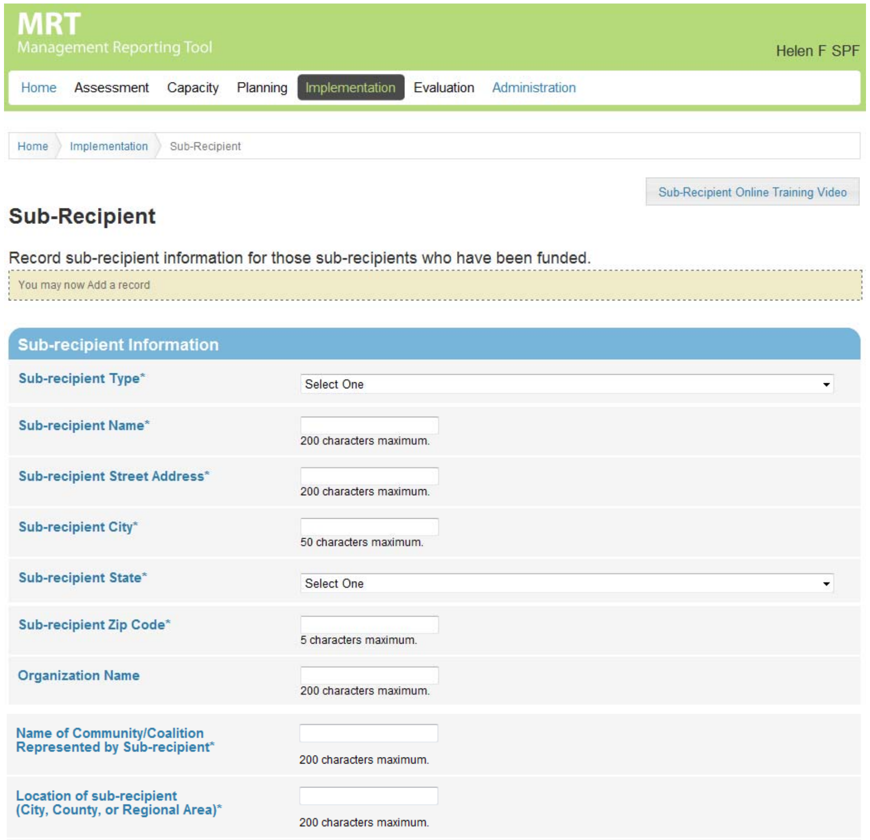
Adding a Sub-Recipient

1. Click **Implementation** from the Menu.
2. Click **Sub-Recipient** from the Implementation Landing Page.
3. Click the Add Sub-recipient (**Add Sub-Recipient**) button.



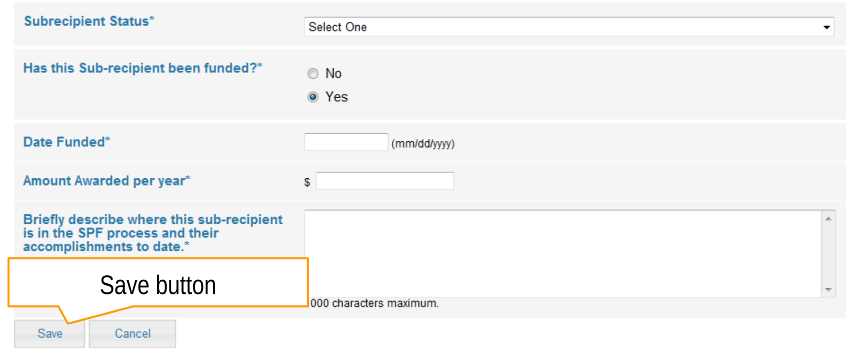
Sample screenshot displaying the Sub-Recipient Listing Page

4. Select the type of sub-recipient from the **Sub-recipient Type*** dropdown menu.
    a. If *Sub-State* is selected, select the sub-state name from the **Sub-State Name*** dropdown menu.
    *Note: The Sub-State Name dropdown menu is populated with the information added in the Sub-State Information module.
5. Enter a name for the sub-recipient in the **Sub-recipient Name*** text box.
6. Enter the street address for the sub-recipient in the **Sub-recipient Street Address*** text box.
7. Enter the city the sub-recipient resides in in the **Sub-recipient City*** text box.
8. Select the state the sub-recipient resides in from the **Sub-recipient State*** dropdown menu.
9. Enter the 5-digit zip code the sub-recipient resides in in the **Sub-recipient Zip Code*** text box.
10. If desired, enter the name of the sub-recipient's organization in the **Organization Name** text box.
11. Enter the name of the represented community/coalition in the **Name of Community/Coalition Represented by Sub-recipient*** text box.
12. Enter the location of the sub-recipient in the **Location of Sub-recipient (City, County, or Regional Area)*** text box.
13. Use the **Has this Sub-recipient been funded?*** radio buttons to select if the sub-recipient has received funding.
    a. If *Yes* was selected new fields will populate.
        i. Enter the date the sub-recipient was funded in the **Date Funded*** text box as mm/dd/yyyy or use the Calendar feature to select the date. (See the Calendar Feature section for additional details.)
14. Enter the amount of money the sub-recipient was awarded in the **Amount Awarded per year*** text box.
15. Enter the location of the sub-recipient in the **Location of Sub-recipient (City, County, or Regional Area)*** text box.



Screenshot displaying the Sub-Recipient Edit Form – this is a partial screenshot

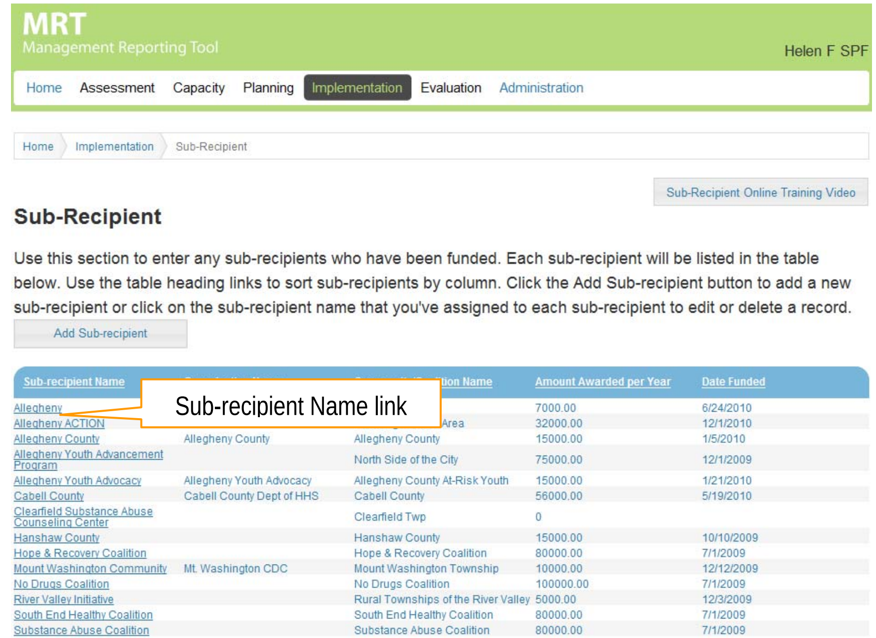
16. Select the status of the sub-recipient in the **Subrecipient Status*** dropdown menu.
17. Use the **Has this Sub-recipient been funded?*** radio buttons to select if the sub-recipient has received funding.
    a. If *Yes* was selected new fields will populate.
        i. Enter the date the sub-recipient was funded in the **Date Funded*** text box as mm/dd/yyyy or use the Calendar feature to select the date. (See the [Calendar Feature](#) section for additional details.)
        ii. Enter the amount of money the sub-recipient was awarded in the **Amount Awarded per year*** text box.
18. **Briefly describe where the sub-recipient is in the SPF process and their accomplishments to date*** in the text field.
19. Click the (**Save**) button.
    *Note: Click the (**Cancel**) button to cancel this entry.



Sample screenshot displaying the Sub-Recipient Edit Form – this is a partial screenshot

Editing a Sub-Recipient

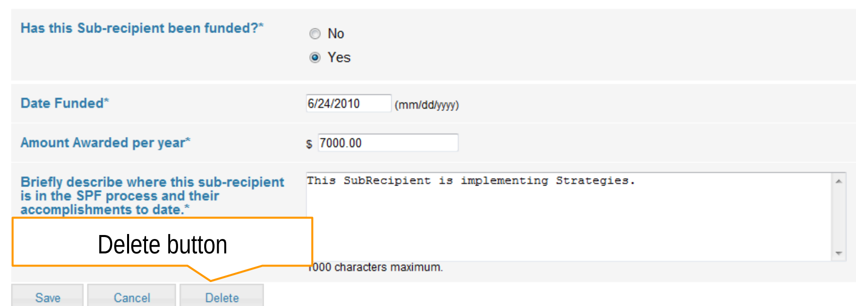
1. Click **Implementation** from the Menu.
2. Click **Sub-Recipient** from the Implementation Landing Page.
3. From the Listing Page, select the sub-recipient you wish to edit by clicking the appropriate Sub-recipient Name.
4. Make any changes needed to the form.
5. Click the Save (**Save**) button.
   *Note: Click the Cancel (**Cancel**) button to cancel this entry.



Sample screenshot displaying the Sub-Recipient Listing Page

Deleting a Sub-Recipient

1. Click **Implementation** from the Menu.
2. Click **Sub-Recipient** from the Implementation Landing Page.
3. From the Listing Page, select the sub-recipient you wish to edit by clicking the appropriate Sub-recipient Name.
4. Click the Delete (**Delete**) button.
   *Note: Click the Cancel (**Cancel**) button to cancel this entry.
5. The record will be removed from the grid.

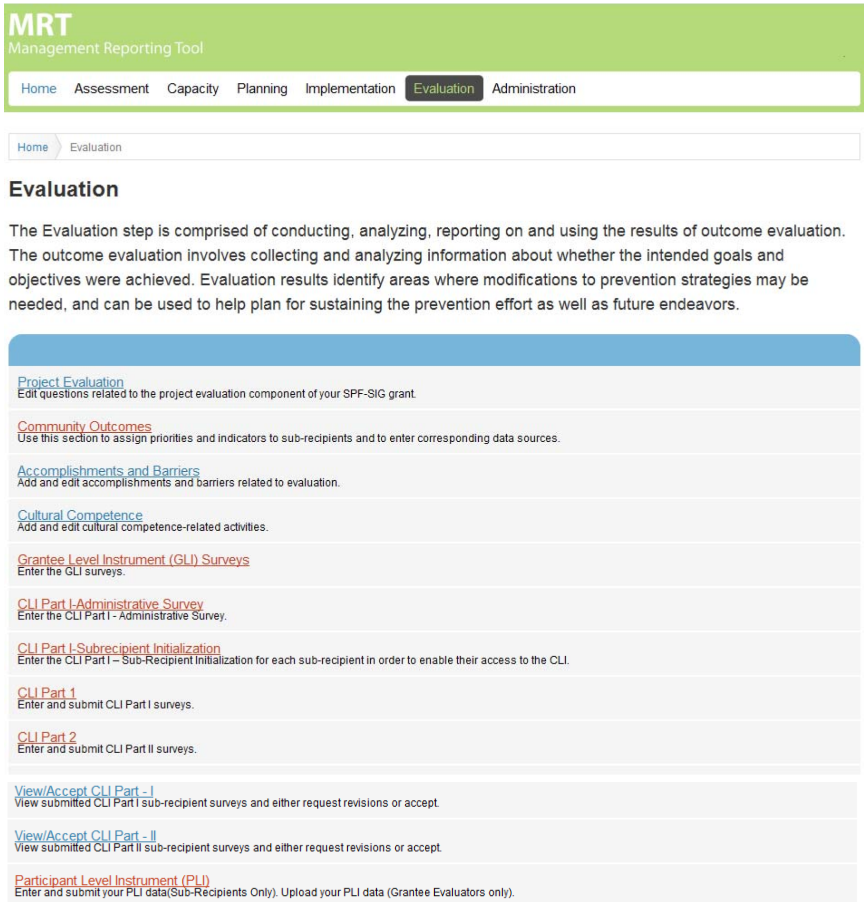


Sample screenshot displaying the Sub-Recipient Edit Form – this is a partial screenshot

EVALUATION

Within the Evaluation module, a user is able to perform the following tasks:

1. Enter Grantee Level Instrument (GLI) Surveys.
2. Enter CLI Part I-Administrative Survey.
3. Enter CLI Part I-Sub-recipient Initialization.
4. Enter CLI Part I.
5. Enter CLI Part II.
6. View/Accept CLI Part I.
7. View/Accept CLI Part II.
8. Participant Level Instrument (PLI)
9. Create PLI User Accounts



Screenshot displaying the Evaluation Landing Page

Grantee Level Instrument (GLI) Infrastructure Survey

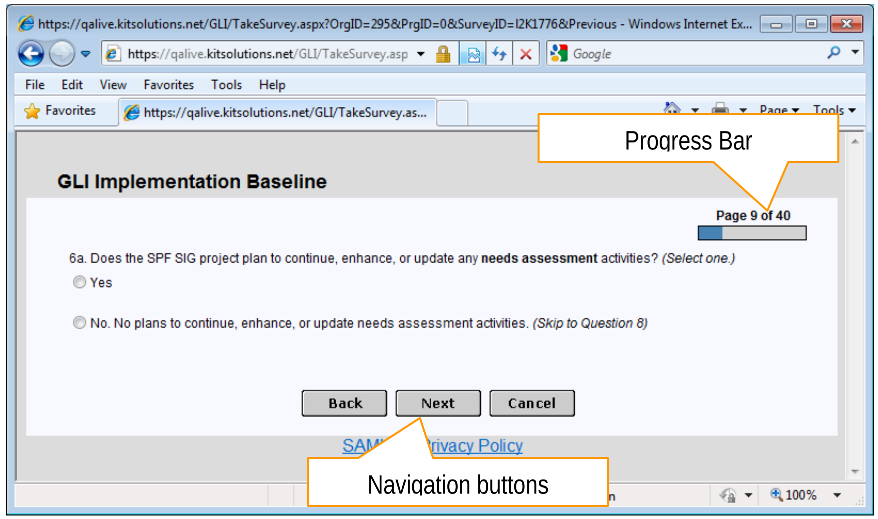
The Strategic Prevention Framework State Incentive Grant Grantee Level Instrument Infrastructure Survey (SPF SIG GLI Infrastructure Survey) is designed to collect information at the jurisdiction (state, tribe, territory) level. This survey should be completed twice over the life of the Grant.

Entering the GLI Infrastructure Survey

1. Click **Evaluation** from the Menu.
2. Click **Grantee Level Instrument (GLI) Surveys** from the Evaluation Landing Page.
3. Click the GLI Infrastructure (**GLI Infrastructure**) link from the Grantee Level Instrument (GLI) Surveys listing page.
4. A new window will open displaying the survey.

Screenshot displaying page 1 of the GLI Infrastructure Survey

5. Answer each question by filling in the appropriate radio button, check boxes, or text field.
6. Click the Next (**Next**) button to move to the next page or use the Back (**Back**) button to return to a previous page.
7. Once you have answered all the questions, click the Done (**Done**) button.
   *Note: The final page is to be completed by the Project Director.
8. Click the Close (**Close**) button to close the window.
9. Click the Print Response (**Print Response**) button to print the survey.



Screenshot displaying the GLI Infrastructure Survey

*Note: The Progress Bar at the top of each page shows how much of the survey has been completed.

Tips

- If you must exit the survey before finishing, all answers will automatically be saved. Upon return you will be taken to the last question answered.
- You will need to turn off your pop-up blocker in order to open the survey.

Grantee Level Instrument (GLI) Implementation Survey

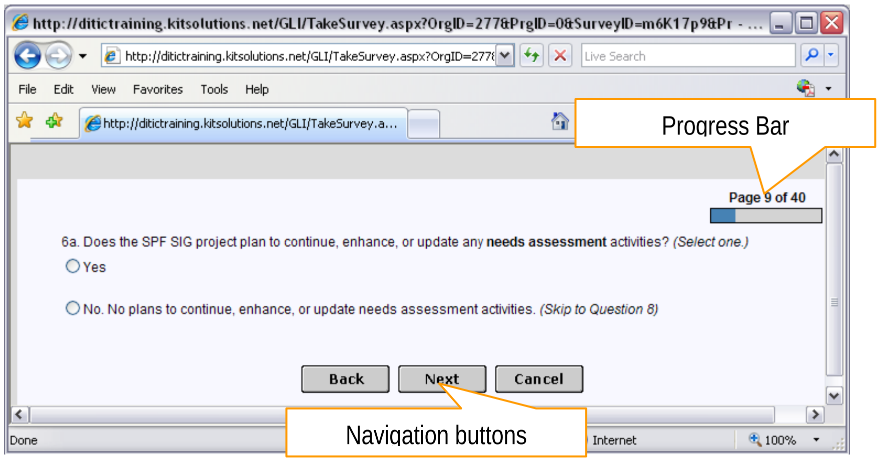
The Strategic Prevention Framework State Incentive Grant Grantee Level Instrument Implementation Survey (SPF SIG GLI Implementation Survey) is designed to collect information at the jurisdiction (state, tribe, territory) level. This survey should be completed twice over the life of the grant.

Enter the GLI Implementation Survey

1. Click **Evaluation** from the Menu.
2. Click **Grantee Level Instrument (GLI) Surveys** from the Evaluation Landing Page.
3. Click the GLI Implementation (**GLI Implementation**) link from the Grantee Level Instrument (GLI) Surveys listing page.
4. A new window will open displaying the survey.
5. Answer each question by filling in the appropriate radio button, check boxes, or text field.
6. Click the Next (**Next**) button to move to the next page or use the Back (**Back**) button to return to a previous page.
7. Once you have answered all the questions, click the Done (**Done**) button. *Note: The final page is to be completed by the Project Director.
8. Click the Close (**Close**) button to close the window.
9. Click the Print Response (**Print Response**) button to print the survey.

*Note: The Progress Bar at the top of each page shows how much of the survey has been completed.

Screenshot displaying page 1 of the GLI Implementation Survey



Screenshot displaying the GLI Implementation Survey

Tips

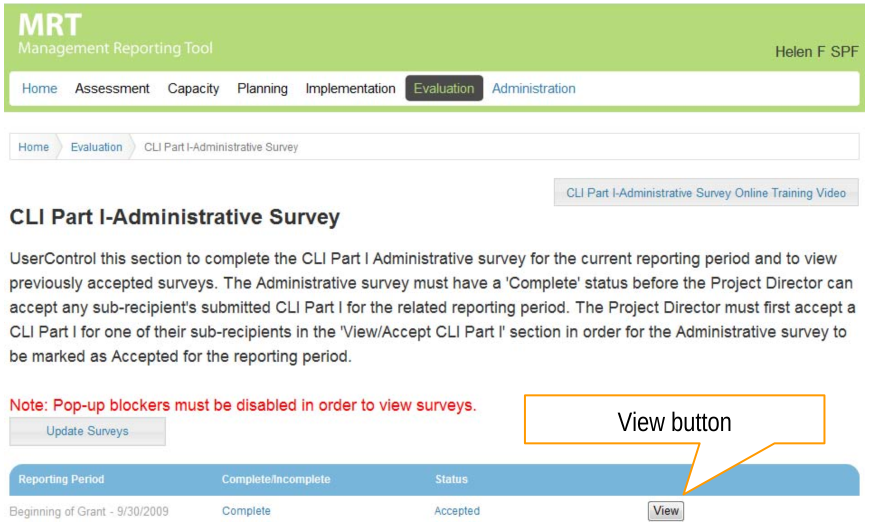
- If you must exit the survey before finishing, all answers will automatically be saved. Upon return you will be taken to the last question answered.
- You will need to turn off your pop-up blocker in order to open the survey.

CLI Part I-Administrative Survey

The CLI Part I-Administrative module allows the user to enter their CLI Part I-Administrative Survey.

Entering the CLI Part I-Administrative Survey

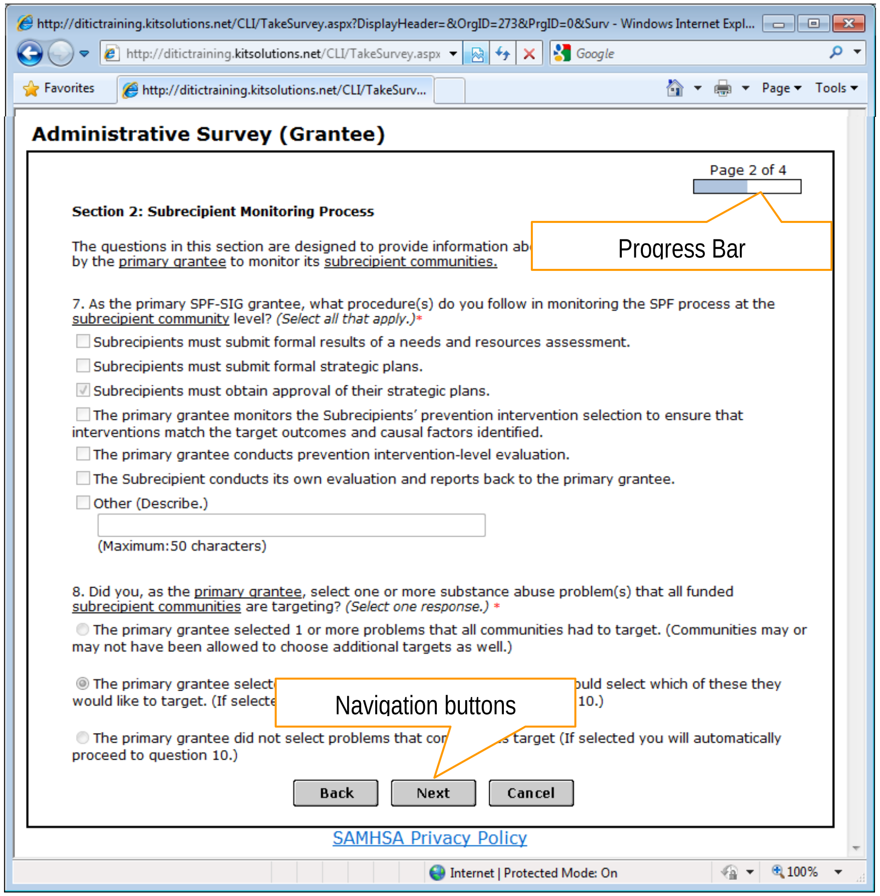
1. Click **Evaluation** from the Menu.
2. Click **CLI Part I-Administrative Survey** from the Evaluation Landing Page.
3. Click the link of the appropriate Reporting Period.
    a. If the status of the survey is ***Accepted***, click the View (**View**) button to open the survey.
4. A new window will open displaying the survey.



Sample screenshot displaying the CLI Part I-Administrative Survey Listing Page

5. Answer each question by filling in the appropriate radio button, check boxes, or text field.
6. Click the Next (**Next**) button to move to the next page or use the Back (**Back**) button to return to a previous page.
7. Once you have answered all the questions, click the Done (**Done**) button.
8. Click the Close (**Close**) button to close the window.

*Note: The Progress Bar at the top of each page shows how much of the survey has been completed.



Screenshot displaying the CLI Part I-Administrative Survey

Tips

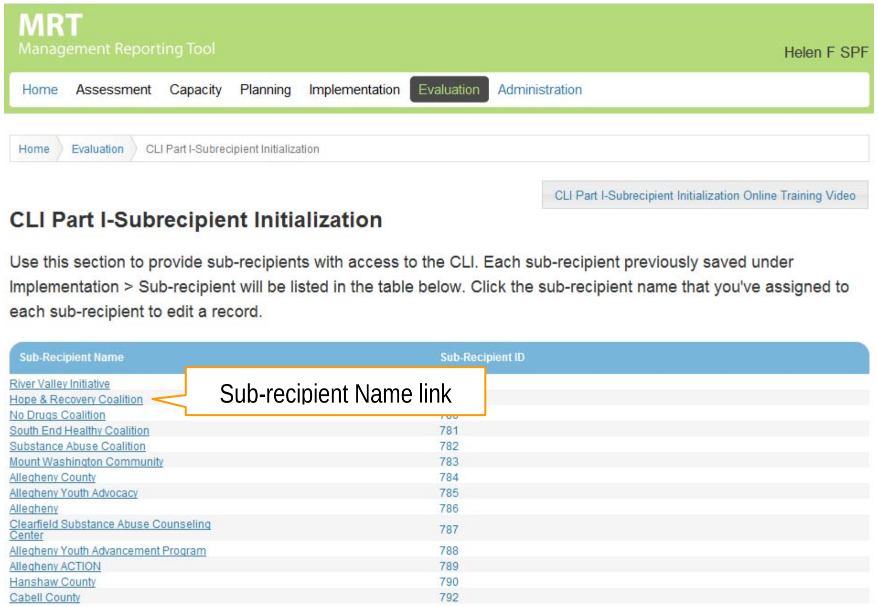
- If you must exit the survey before finishing, all answers will automatically be saved. Upon return you will be taken to the last question answered.
- You will need to turn off your pop-up blocker in order to open the survey.
- Once you complete the survey, the completion/incompletion status of the survey will not update automatically. Click the Update Surveys (**Update Surveys**) button to update the status.
- Once the previous reporting period is in *Accepted* status, the link for the next reporting period will become available.

CLI Part I-Sub-recipient Initialization

In order to provide the Sub-recipient community with access to the CLI Part I and Part II surveys a login account must be created for the Sub-recipient. The CLI Sub-recipient Initialization module allows the Grantee to create Sub-recipient contacts for the Sub-recipient communities. The Sub-recipient communities listed on the Sub-recipient Initialization Listing Page are those previously entered in Implementation>Sub-recipient.

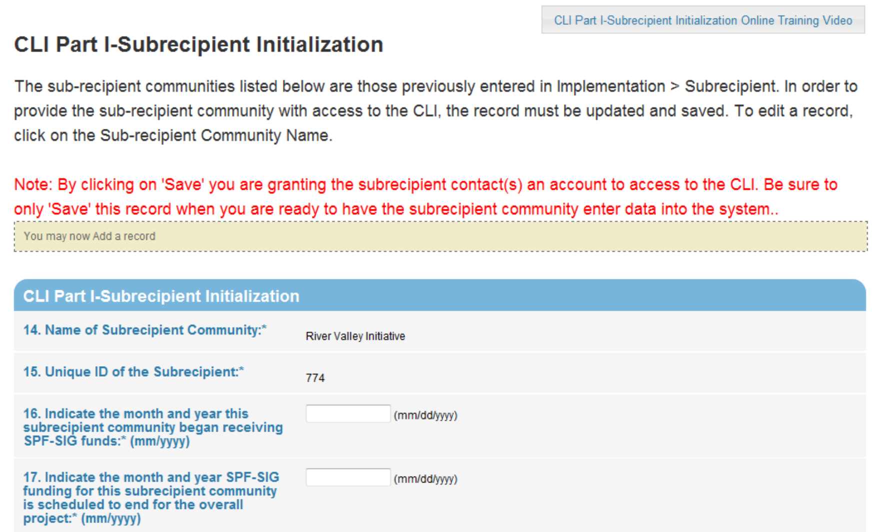
Adding a Sub-recipient Initialization Contact

1. Click **Evaluation** from the Menu.
2. Click **CLI Part I-Sub-recipient Initialization** from the Evaluation Landing Page.
3. From the Listing Page, select the Sub-Recipient Name.



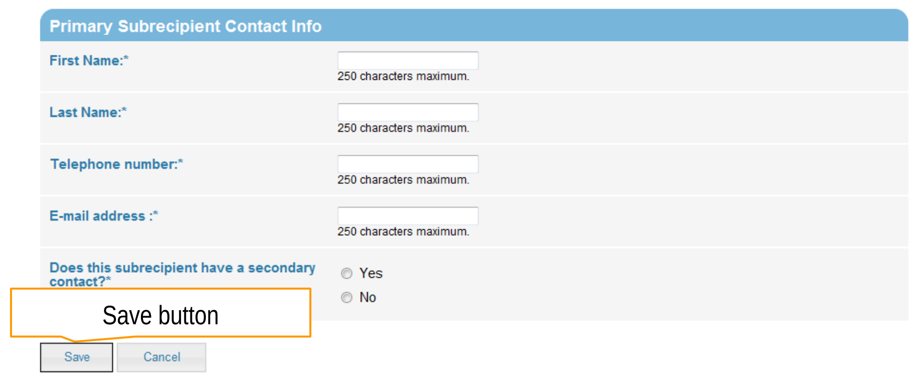
Sample screenshot displaying the CLI Part I-Sub-recipient Initialization Listing Page

4. The **Name of Sub-recipient Community*** and **Unique ID of the Sub-recipient** have been filled out for you.
5. Enter the date the Sub-recipient community began receiving funds in the **Indicate the month and year this sub-recipient community began receiving SPF-SIG funds*** text box as mm/dd/yyyy or use the Calendar feature to select the date. (See the Calendar Feature section for additional details.)
6. Enter the date the Sub-recipient community's funding is scheduled to end in the **Indicate the month and year SPF-SIG funding for this sub-recipient community is scheduled to end for the overall project*** text box as mm/dd/yyyy or use the Calendar feature to select the date.



Sample screenshot displaying the CLI Part I-Sub-recipient Initialization Edit Form – this is a partial screenshot

7. Enter the Sub-recipient community's Contact in the **Primary Sub-recipient Contact Info** fields.
   a. Enter the contact's first name in the **First Name*** text box.
   b. Enter the contact's last name in the **Last Name*** text box.
   c. Enter the contact's phone number in the **Telephone number*** text box.
   d. Enter the contact's email address in the **E-mail address*** text box.
   e. Use the radio buttons to answer **Does this sub-recipient have a secondary contact?***.
      i. If *Yes* is selected, new fields will appear. Enter the **Secondary Sub-recipient Contact Info**.
8. Click the Save (**Save**) button.
   *Note: Click the Cancel (**Cancel**) button to cancel this entry.



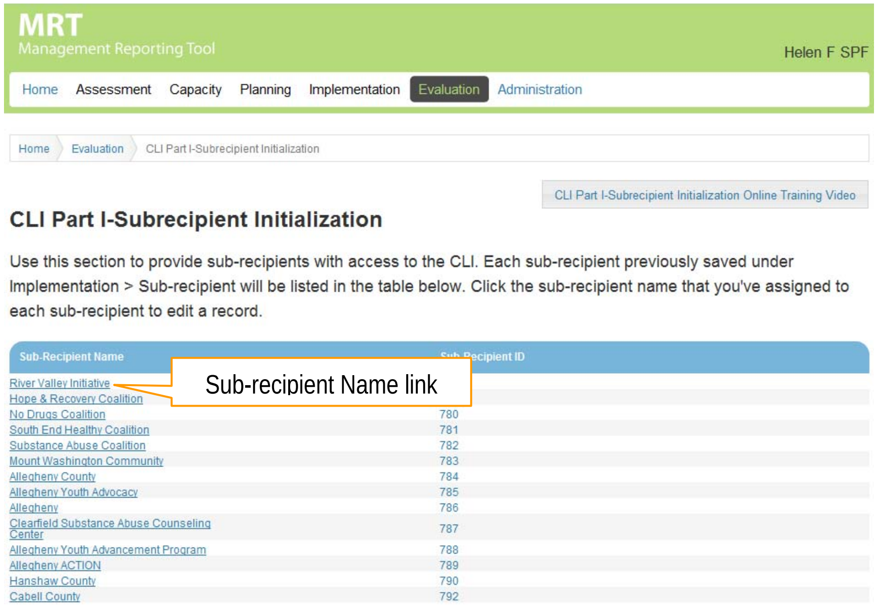
Screenshot displaying the Primary Sub-recipient Contact Info fields on the CLI Part I-Sub-recipient Initialization Edit – this is a partial screenshot

Tips

- Once the Sub-recipient Initialization form is saved, an email with login information will be sent to the Contact(s) specified for the Sub-recipient community.

Editing a Sub-recipient Initialization Contact

1. Click **Evaluation** from the Menu.
2. Click **CLI Part I-Sub-recipient Initialization** from the Evaluation Landing Page.
3. From the Listing Page, select the Sub-recipient community you wish to edit by clicking the appropriate Sub-Recipient Name.
4. Make any changes needed to the form.
5. Click the Save (**Save**) button.
   *Note: Click the Cancel (**Cancel**) button to cancel this entry.



Sample screenshot displaying the CLI Part I-Sub-recipient Initialization Listing Page

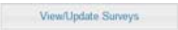
Tips

- Once saved, some fields will be locked and cannot be modified.

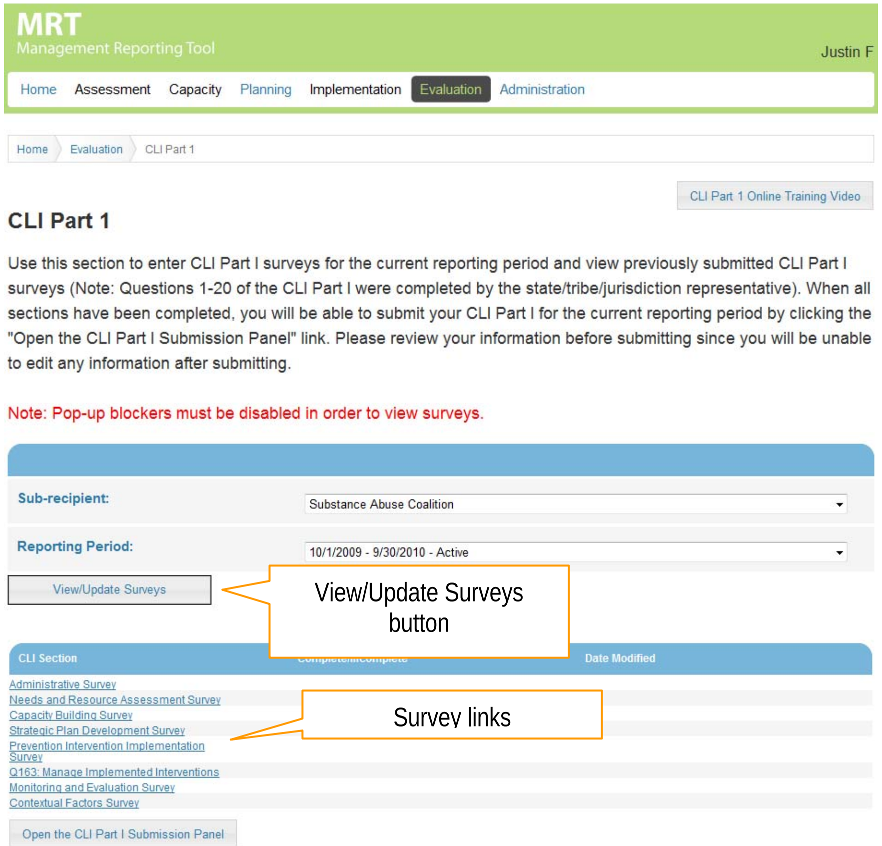
CLI Part I

The CLI Part I module is to be completed by the Grantee's Sub-recipient communities.

Entering a CLI Part I Survey

1. Click **Evaluation** from the Menu.
2. Click **CLI Part I** from the Evaluation Landing Page.
3. Select the Sub-recipient community name from the **Sub-recipient*** dropdown menu.
   *Note: This step is only needed if you are logged in as the Grantee modifying a Sub-recipient community's surveys.
4. Select the ***Active*** reporting period from the **Reporting Period*** dropdown menu.
5. Click the 

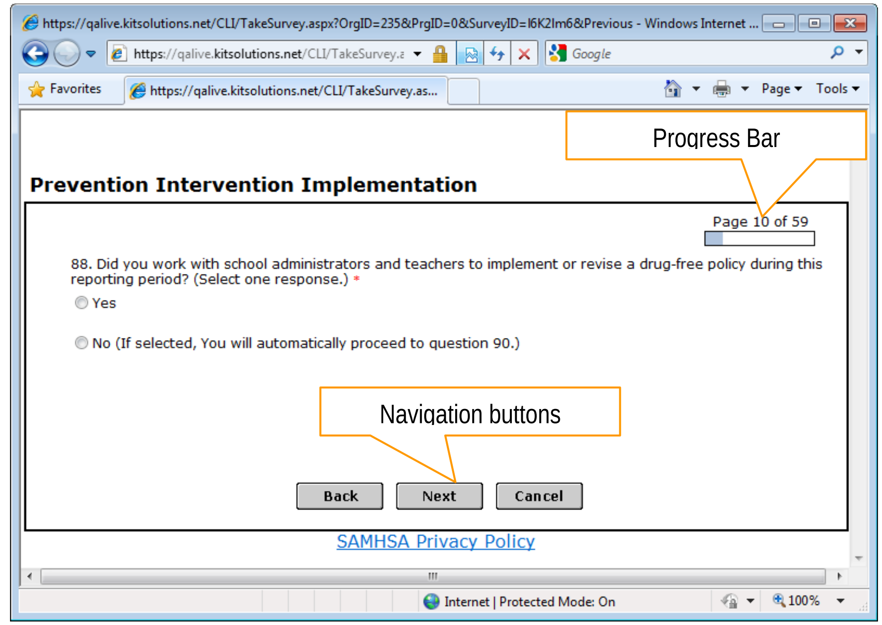
(**View/Update Surveys**) button.
6. Click a Survey link to begin completing a survey.
7. A new window will open displaying the selected Survey.



Sample screenshot displaying the CLI Part I Listing Page

8. Answer each question by filling in the appropriate radio button, check boxes, or text field.
9. Click the Next (**Next**) button to move to the next page or use the Back (**Back**) button to return to a previous page.
10. Once you have answered all the questions, click the Done (**Done**) button.
11. Click the Close (**Close**) button to close the window.

***Note**: The Progress Bar at the top of each page shows how much of the survey has been completed.



Screenshot displaying one of the CLI Part I Surveys

Tips

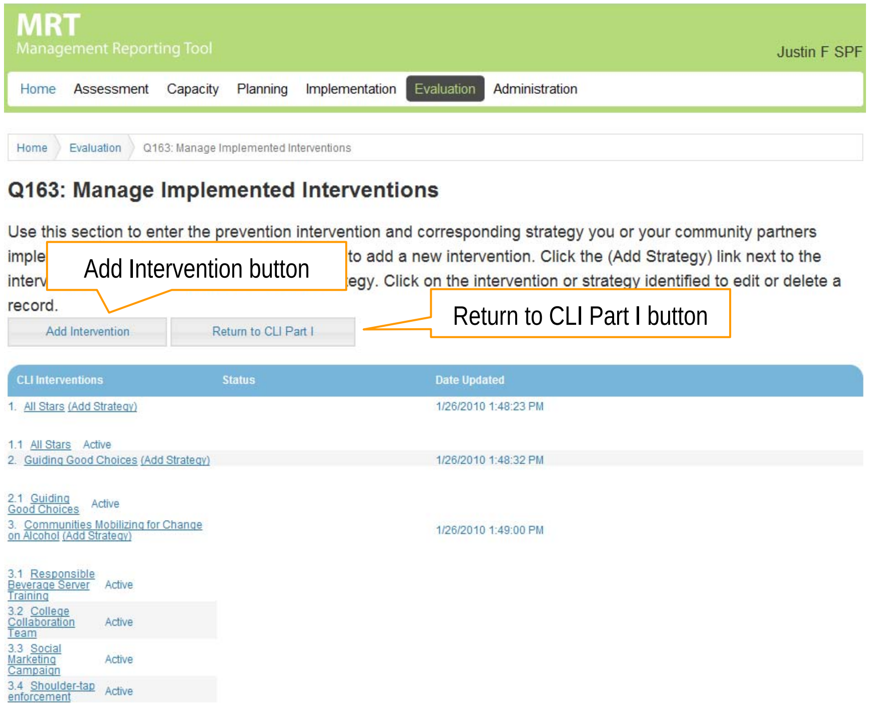
- If you must exit the survey before finishing, all answers will automatically be saved. Upon return you will be taken to the last question answered.
- You will need to turn off your pop-up blocker in order to open the survey.
- Click the View/Update Surveys (**View/Update Surveys**) button to update the Status of your surveys.

Q163: Manage Implemented Interventions

The Manage Implemented Interventions module allows the Sub-recipients to add interventions and strategies. At least one (1) intervention and one (1) strategy must be entered in order to submit the CLI Part I.

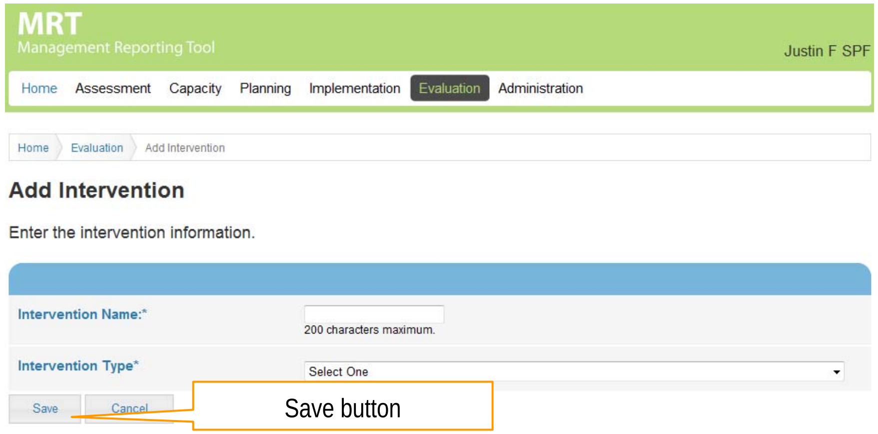
Adding an Intervention

1. Click **Evaluation** from the Menu.
2. Click **CLI Part I** from the Evaluation Landing Page.
3. Select the Sub-recipient community name from the **Sub-recipient*** dropdown menu.
   *Note: This step is only needed if you are logged in as the Grantee modifying a Sub-recipient community's surveys.
4. Select the appropriate reporting period from the **Reporting Period*** dropdown menu.
5. Click the View/Update Surveys (**View/Update Surveys**) button.
6. Click the Q163: Manage Implemented Interventions (**Q163: Manage Implemented Interventions**) link.
7. Click the Add Intervention (**Add Intervention**) button.



Sample screenshot displaying the Manage Implemented Interventions Listing Page

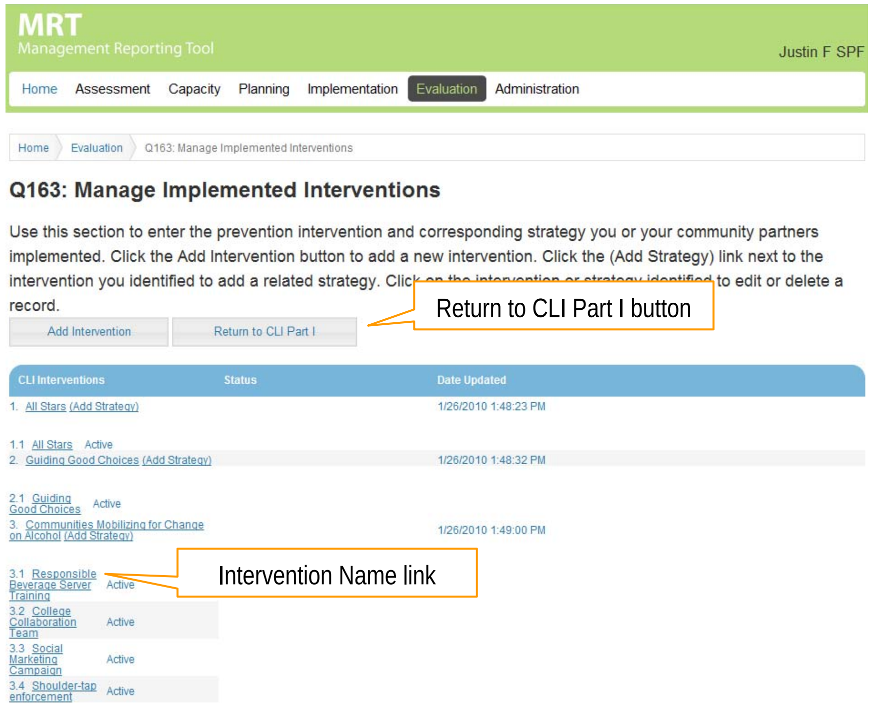
8. Enter a name for the intervention in the **Intervention Name*** text box.
9. Select the type of intervention from the **Intervention Type*** dropdown menu.
10. Click the (**Save**) button.
    *Note: Click the (**Cancel**) button to cancel this entry.
11. Click the (**Return to CLI Part I**) button.



Screenshot displaying the Manage Implemented Interventions Edit Form

<u>Editing an Intervention</u>

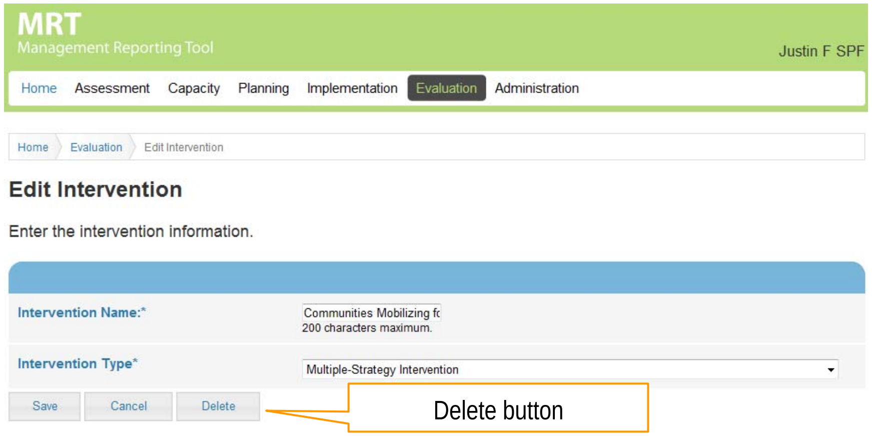
1. Click **Evaluation** from the Menu.
2. Click **CLI Part I** from the Evaluation Landing Page.
3. Select the Sub-recipient community name from the **Sub-recipient*** dropdown menu.
   *Note: This step is only needed if you are logged in as the Grantee modifying a Sub-recipient community's surveys.
4. Select the appropriate reporting period from the **Reporting Period*** dropdown menu.
5. Click the (**View/Update Surveys**) button.
6. Click the Q163: Manage Implemented Interventions (**Q163: Manage Implemented Interventions**) link.
7. From the Listing Page, select the intervention name you wish to edit by clicking the appropriate CLI Intervention name.
8. Make any changes needed to the form.
9. Click the (**Save**) button.
   *Note: Click the (**Cancel**) button to cancel this entry.
10. Click the (**Return to CLI Part I**) button.



Sample screenshot displaying the Manage Implemented Interventions Listing Page

Deleting an Intervention

1. Click **Evaluation** from the Menu.
2. Click **CLI Part I** from the Evaluation Landing Page.
3. Select the Sub-recipient community name from the **Sub-recipient*** dropdown menu.
   *Note: This step is only needed if you are logged in as the Grantee modifying a Sub-recipient community's surveys.
4. Select the appropriate reporting period from the **Reporting Period*** dropdown menu.
5. Click the (**View/Update Surveys**) button.
6. Click the Q163: Manage Implemented Interventions (**Q163: Manage Implemented Interventions**) link.
7. From the Listing Page, select the intervention name you wish to delete by clicking the appropriate CLI Intervention name.
8. Click the (**Delete**) button.
   *Note: Click the (**Cancel**) button to cancel this entry.
9. The record will be removed from the grid.



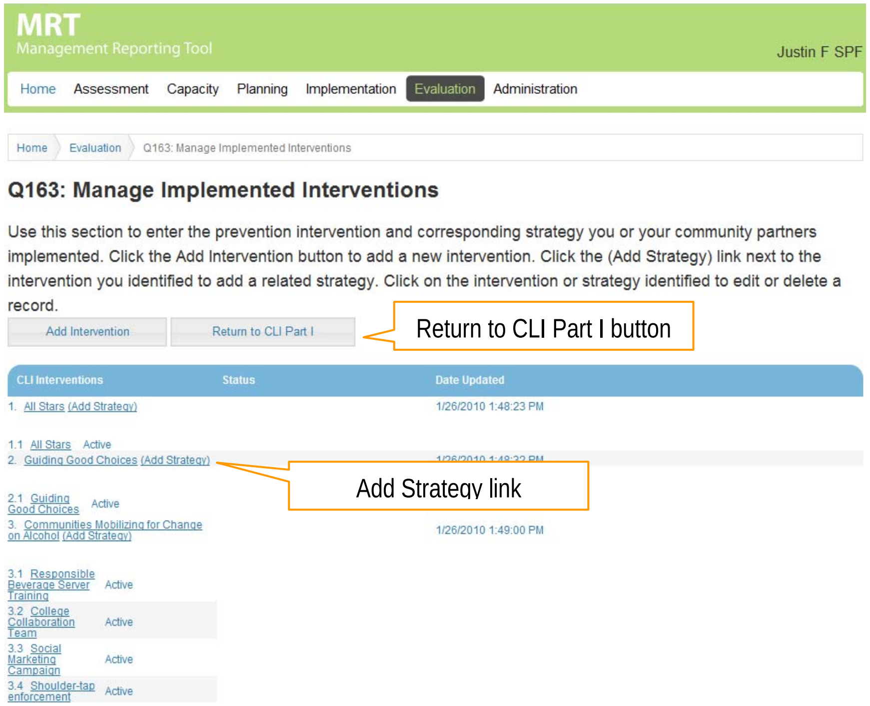
Sample screenshot displaying the Manage Implemented Interventions Edit Form

Q163: Manage Implemented Interventions – Strategies

Strategies are added to the identified Interventions. At least one (1) intervention and one (1) strategy must be entered in order to submit the CLI Part I.

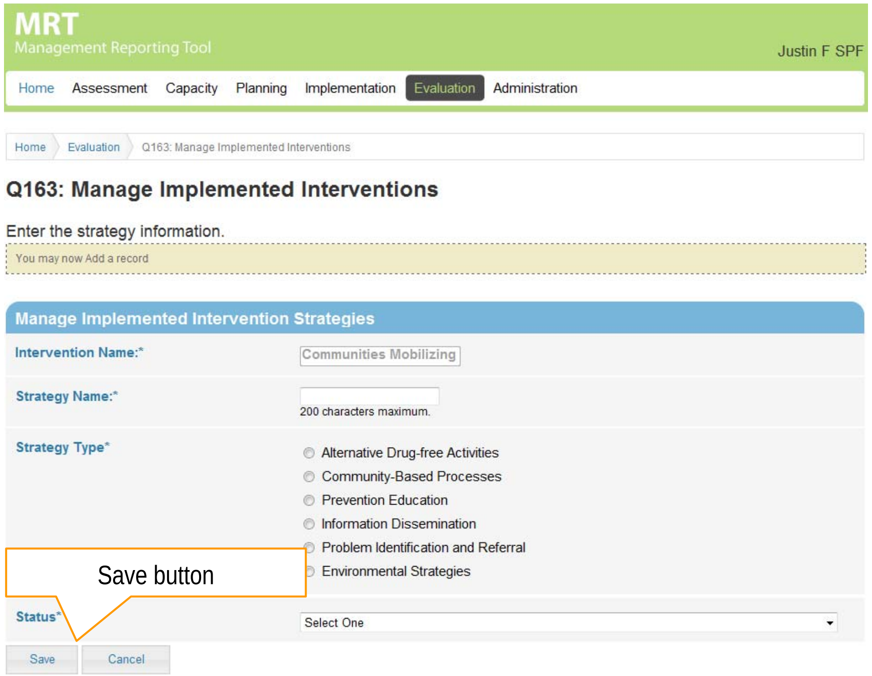
Adding a Strategy

1. Click **Evaluation** from the Menu.
2. Click **CLI Part I** from the Evaluation Landing Page.
3. Select the Sub-recipient community name from the **Sub-recipient*** dropdown menu.
   *Note: This step is only needed if you are logged in as the Grantee modifying a Sub-recipient community's surveys.
4. Select the appropriate reporting period from the **Reporting Period*** dropdown menu.
5. Click the View/Update Surveys (**View/Update Surveys**) button.
6. Click the Q163: Manage Implemented Interventions (**Q163: Manage Implemented Interventions**) link.
7. Click the (Add Strategy) (**Add Strategy**) link.



Sample screenshot displaying the Manage Implemented Interventions Listing Page

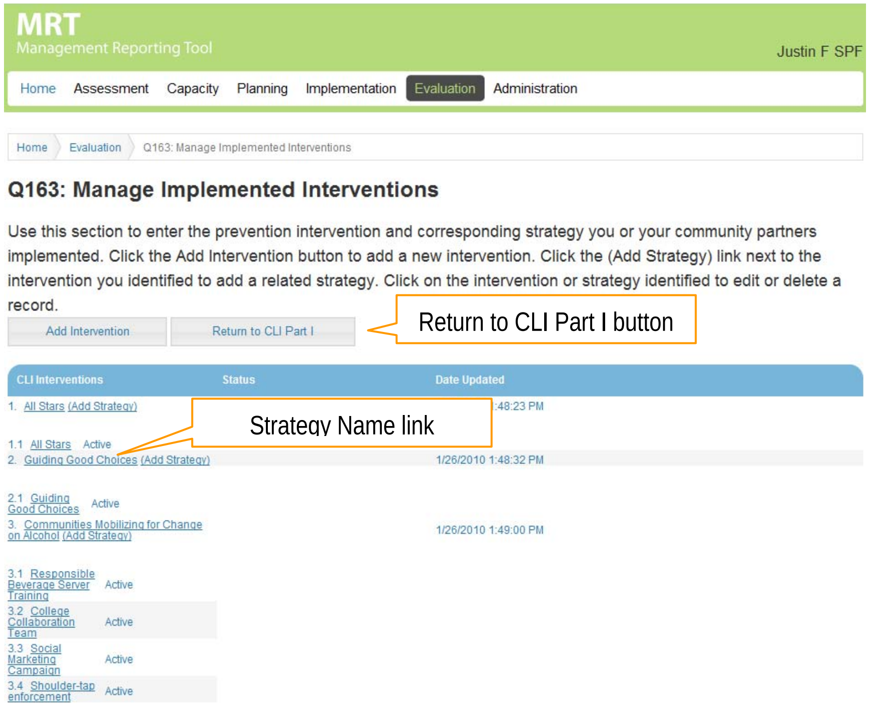
8. The **Intervention Name*** will be filled in for you.
9. Enter a name for the strategy in the **Strategy Name*** text box.
   *Note: If the intervention type was *Single-Strategy Intervention* the Strategy Name will be filled in for you.
10. Select the type of strategy using the **Strategy Type*** radio buttons.
    *Note: The selected Strategy Type will determine the sub-forms that will be completed in the CLI Part II.
11. Select the status of the strategy from the **Status*** dropdown menu.
    a. *Active*: currently being implemented.
    b. *Discontinued*: no longer being implemented.
    c. *Completed*: completed or no longer in use.
       i. If *Completed* is selected, enter the date the strategy was completed in the **Date Completed*** text box.
12. Click the (**Save**) button.
    *Note: Click the (**Cancel**) button to cancel this entry.
13. Click the (**Return to CLI Part I**) button.



Screenshot displaying the Add Strategy Edit Form

Editing a Strategy

1. Click **Evaluation** from the Menu.
2. Click **CLI Part I** from the Evaluation Landing Page.
3. Select the Sub-recipient community name from the **Sub-recipient*** dropdown menu.
   *Note: This step is only needed if you are logged in as the Grantee modifying a Sub-recipient community's surveys.
4. Select the appropriate reporting period from the **Reporting Period*** dropdown menu.
5. Click the View/Update Surveys (**View/Update Surveys**) button.
6. Click the Q163: Manage Implemented Interventions (**Q163: Manage Implemented Interventions**) link.
7. From the Listing Page, select the strategy name you wish to edit by clicking the appropriate Strategy name.
8. Make any changes needed to the form.
9. Click the Save (**Save**) button.
   *Note: Click the Cancel (**Cancel**) button to cancel this entry.
10. Click the Return to CLI Part I (**Return to CLI Part I**) button.



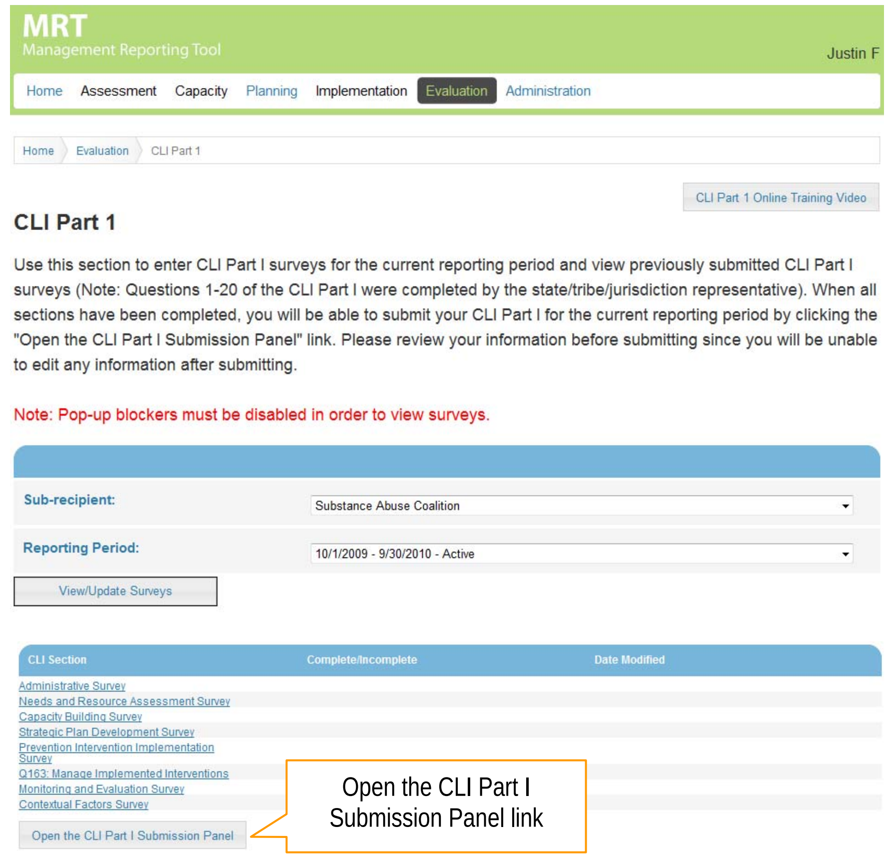
Sample screenshot displaying the Manage Implemented Interventions Listing Page

CLI Part I Submission

Once all of the CLI Part I surveys have been completed it can be submitted for review. The CLI Part I is submitted annually.

Submitting the CLI Part I

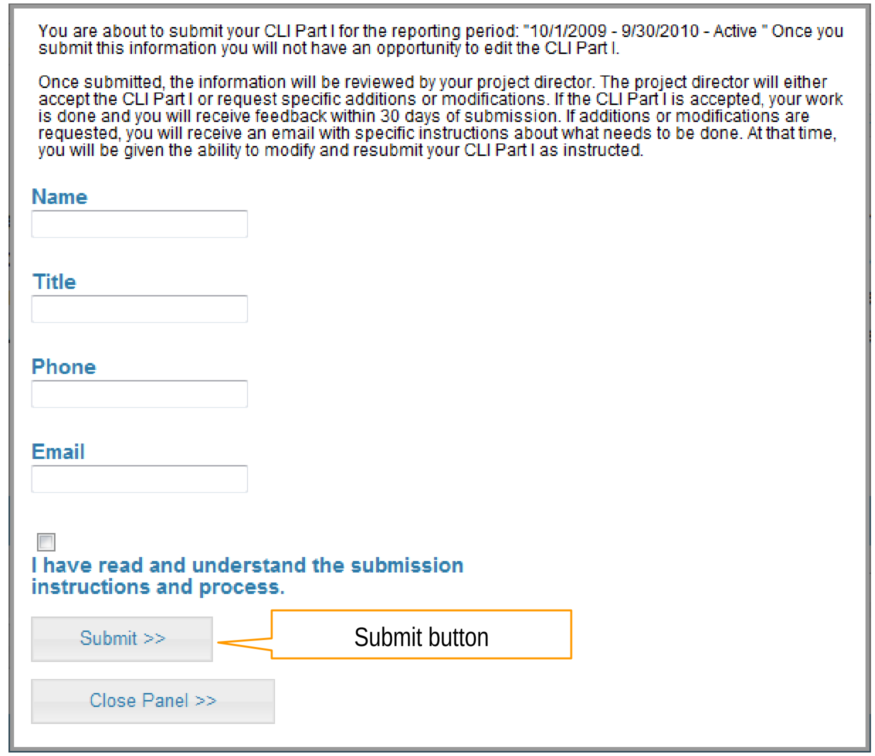
1. Click **Evaluation** from the Menu.
2. Click **CLI Part I** from the Evaluation Landing Page.
3. Select the Sub-recipient community name from the **Sub-recipient*** dropdown menu.
   *Note: This step is only needed if you are logged in as the Grantee modifying a Sub-recipient community's surveys.
4. Select the appropriate reporting period from the **Reporting Period*** dropdown menu.
5. Click the View/Update Surveys (**View/Update Surveys**) button.
6. Click the Open the CLI Part I Submission Panel (**Open the CLI Part I Submission Panel**) button.



Sample screenshot displaying the CLI Part I Listing Page

7. Enter the contact information of the person submitting the CLI Part I in the following fields: **Name**, **Title**, **Phone**, and **Email**.
8. Use the **I have read…** checkbox to indicate you understand the submission process.
9. Click the (**Submit**) button to submit the report.
   *Note: Click the (**Close Panel**) button to cancel the submission.

*Note: Once the (**Submit**) button is selected, an email will be sent to the Contact person specified as well as the Grantee.



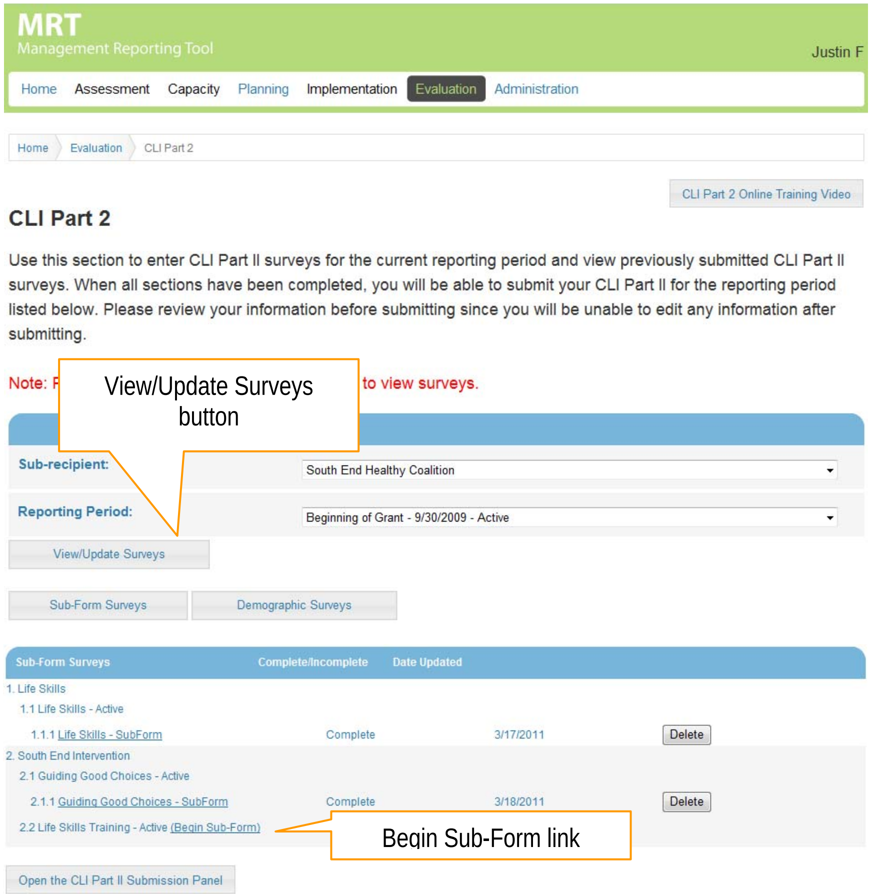
Screenshot displaying the CLI Part I Submission Panel

CLI Part II

The CLI Part II module is to be completed by the Grantee's Sub-recipient communities.

Entering a Sub-Form Survey

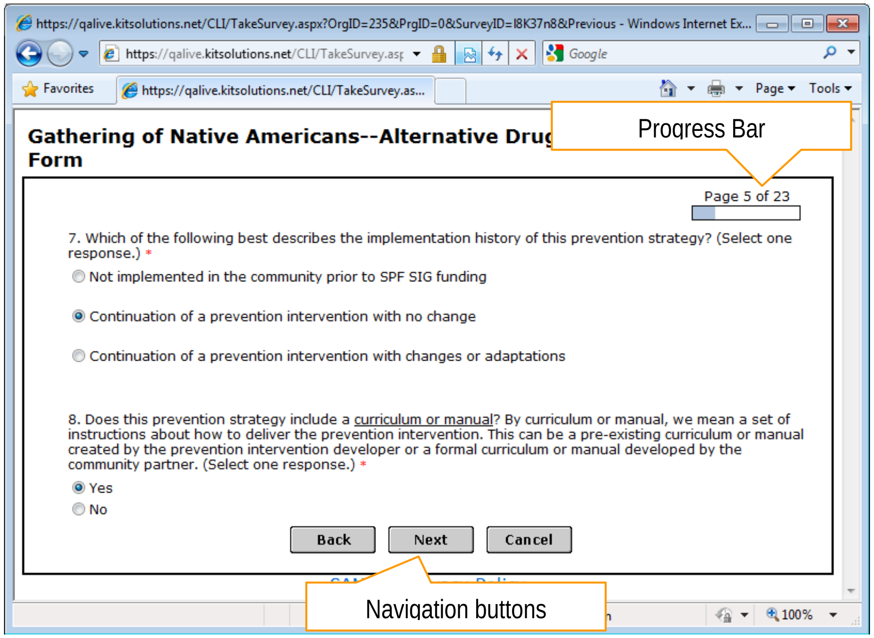
1. Click **Evaluation** from the Menu.
2. Click **CLI Part II** from the Evaluation Landing Page.
3. Select the Sub-recipient community name from the **Sub-recipient*** dropdown menu.
   *Note: This step is only needed if you are logged in as the Grantee modifying a Sub-recipient community's surveys.
4. Select the appropriate reporting period from the **Reporting Period*** dropdown menu.
5. Click the View/Update Surveys (**View/Update Surveys**) button.
6. Click the **Sub-Form Surveys** tab.
7. Click the (Begin Sub-Form) (**Begin Sub-Form**) link.
8. A new window will open displaying the Sub-Form survey.



Sample screenshot displaying the CLI Part II Sub-Form Surveys Listing Page

9. Answer each question by filling in the appropriate radio button, check boxes, or text field.
10. Click the (**Next**) button to move to the next page or use the (**Back**) button to return to a previous page.
11. Once you have answered all the questions, click the (**Done**) button.
12. Click the (**Close**) button to close the window.

*__Note__: The Progress Bar at the top of each page shows how much of the survey has been completed.

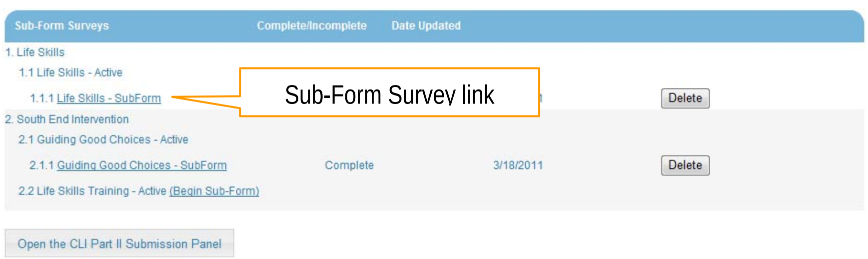


Screenshot displaying one of the CLI Part II Sub-Form Surveys

Tips

- If you must exit the survey before finishing, all answers will automatically be saved. Upon return you will be taken to the last question answered.
- You will need to turn off your pop-up blocker in order to open the survey.
- Click the (**View/Update Surveys**) button to update the Status of your surveys

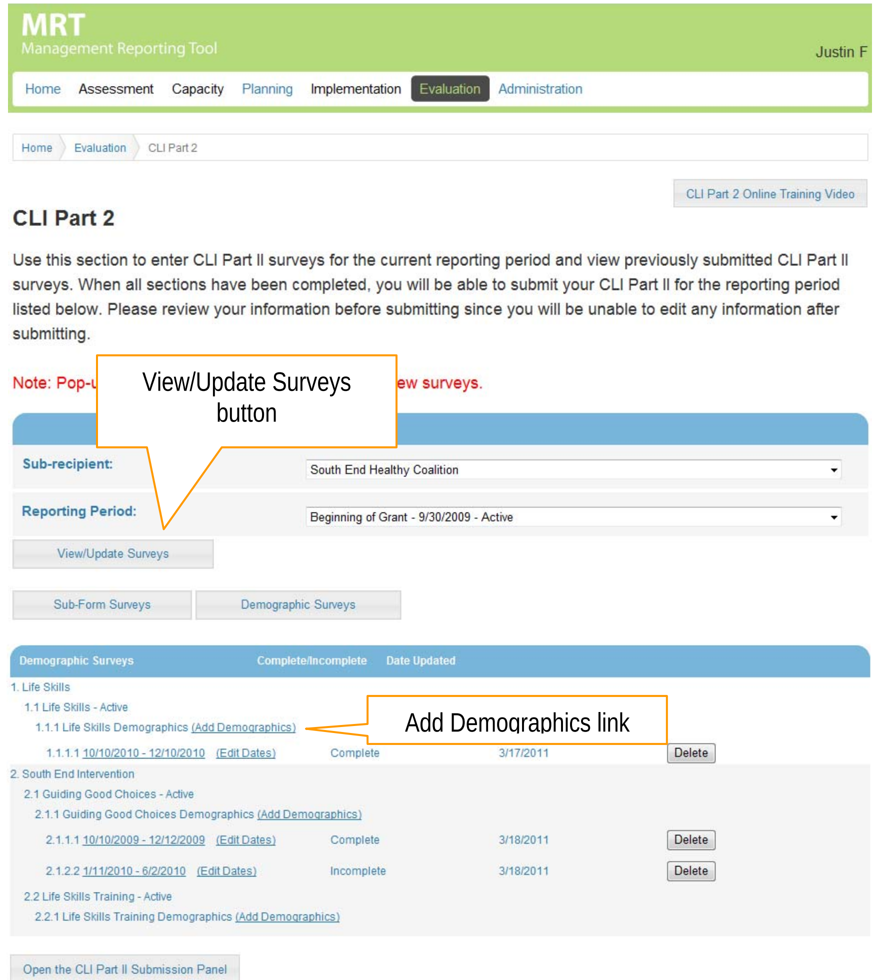
13. Once you have started a Sub-Form survey, the Begin Sub-Form link will be replaced by the Sub-Form name. The Sub-Form name will be the [Strategy Name] - SubForm. This is a link to view or modify the Sub-Form survey.



Sample screenshot displaying the CLI Part II Sub-Form Surveys Listing Page -this is a partial screenshot

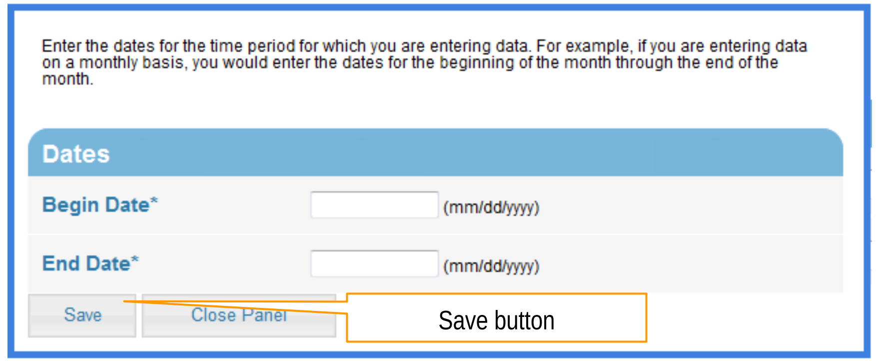
Entering a Demographic Survey

1. Click **Evaluation** from the Menu.
2. Click **CLI Part II** from the Evaluation Landing Page.
3. Select the Sub-recipient community name from the **Sub-recipient*** dropdown menu.
   *Note: This step is only needed if you are logged in as the Grantee modifying a Sub-recipient community's surveys.
4. Select the appropriate reporting period from the **Reporting Period*** dropdown menu.
5. Click the View/Update Surveys (**View/Update Surveys**) button.
6. Click the **Demographics Surveys** tab.
7. Click the (Add Demographics) (**Add Demographics**) link.



Sample screenshot displaying the CLI Part II Demographics Surveys Listing Page

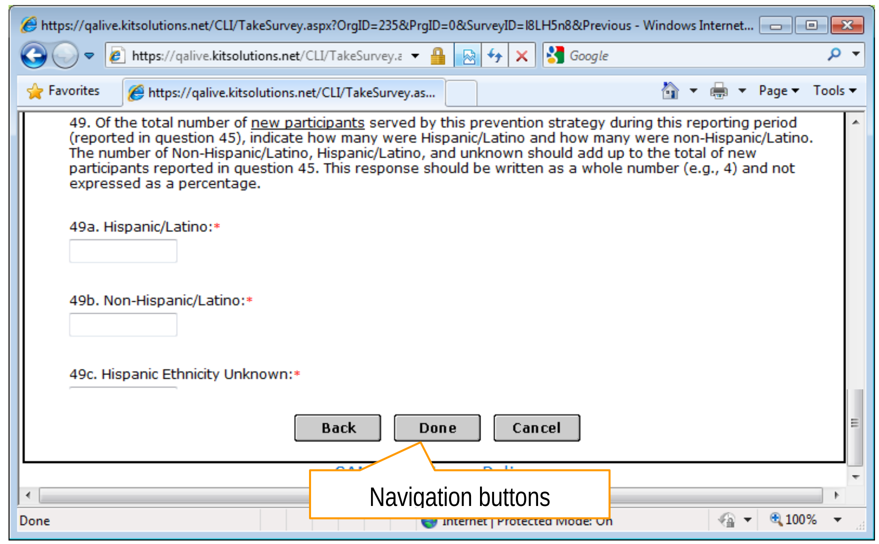
8. Enter the timeframe in the **Begin Date*** and **End Date*** text boxes as mm/dd/yyyy or use the Calendar feature to select the date. (See the [Calendar Feature] section for additional details.)
9. Click the (**Save**) button.
   *Note: Click the (**Close Panel**) button to cancel this entry
10. A new window will open displaying the Demographics survey.



Screenshot displaying the first page of the Demographics Survey

11. Answer each question by filling in the appropriate radio button, check boxes, or text field.
12. Click the (**Next**) button to move to the next page or use the (**Back**) button to return to a previous page.
13. Once you have answered all the questions, click the (**Done**) button.
14. Click the (**Close**) button to close the window.

*Note: The Progress Bar at the top of each page shows how much of the survey has been completed.



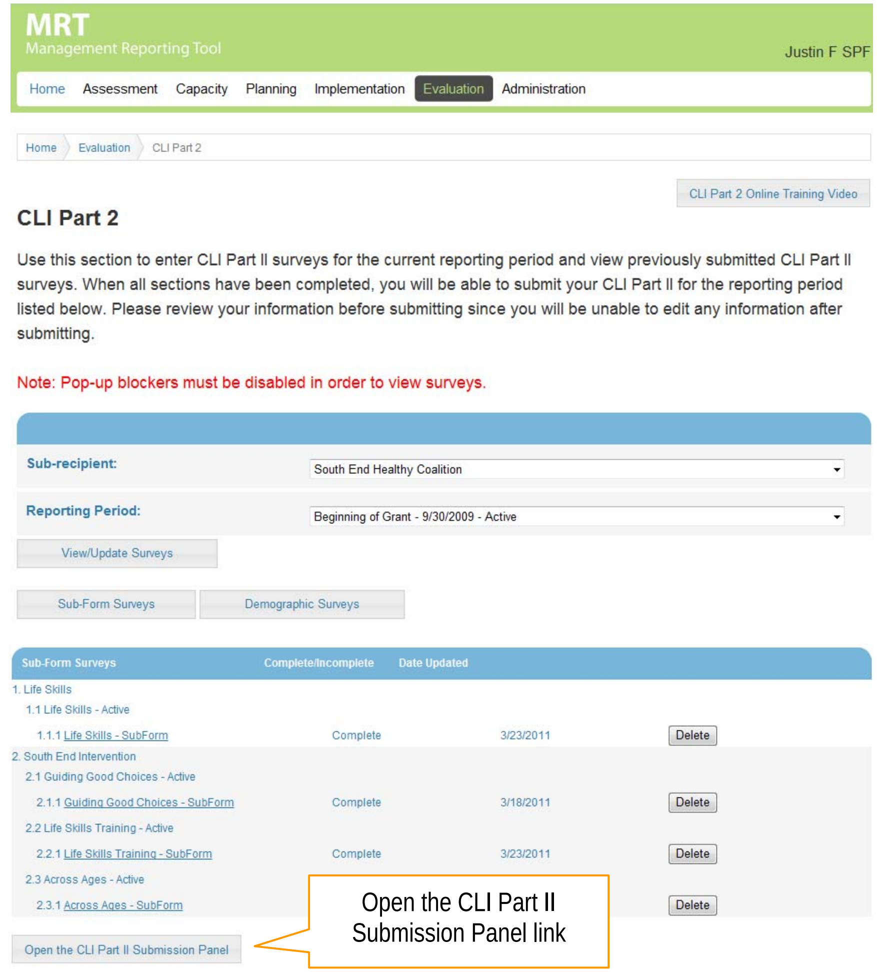
Screenshot displaying the Demographics Survey

Tips

- If you must exit the survey before finishing, all answers will automatically be saved. Upon return you will be taken to the last question answered.
- You will need to turn off your pop-up blocker in order to open the survey.
- Click the (**View/Update Surveys**) button to update the Status of your surveys.

CLI Part II Submission

Once all of the CLI Part II surveys have been completed it can be submitted for review. The CLI Part II is submitted every six (6) months.



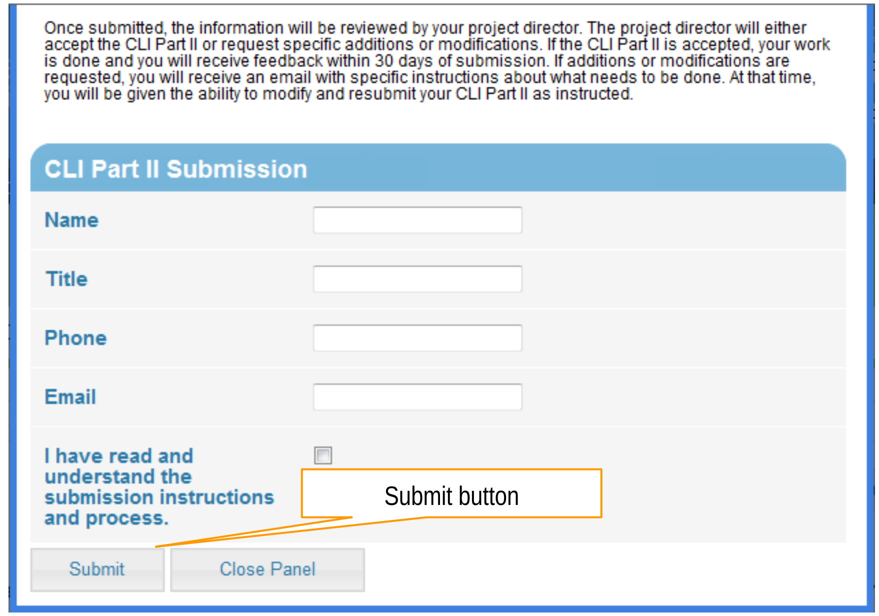
Sample screenshot displaying the CLI Part II Sub-form Surveys Listing Page

Submitting the CLI Part II

1. Click **Evaluation** from the Menu.
2. Click **CLI Part II** from the Evaluation Landing Page.
3. Select the Sub-recipient community name from the **Sub-recipient*** dropdown menu.
   *Note: This step is only needed if you are logged in as the Grantee modifying a Sub-recipient community's surveys.
4. Select the appropriate reporting period from the **Reporting Period*** dropdown menu.
5. Click the View/Update Surveys (**View/Update Surveys**) button.
6. Click the Open the CLI Part II Submission Panel (**Open the CLI Part II Submission Panel**) button.

7. Enter the contact information of the person submitting the CLI Part II in the following fields: **Name**, **Title**, **Phone**, and **Email**.
8. Use the **I have read…** checkbox to indicate you understand the submission process.
9. Click the (**Submit**) button to submit the report.
   *Note: Click the (**Close Panel**) button to cancel the submission.

*Note: Once the (**Submit**) button is selected, an email will be sent to the Contact person specified as well as the Grantee.



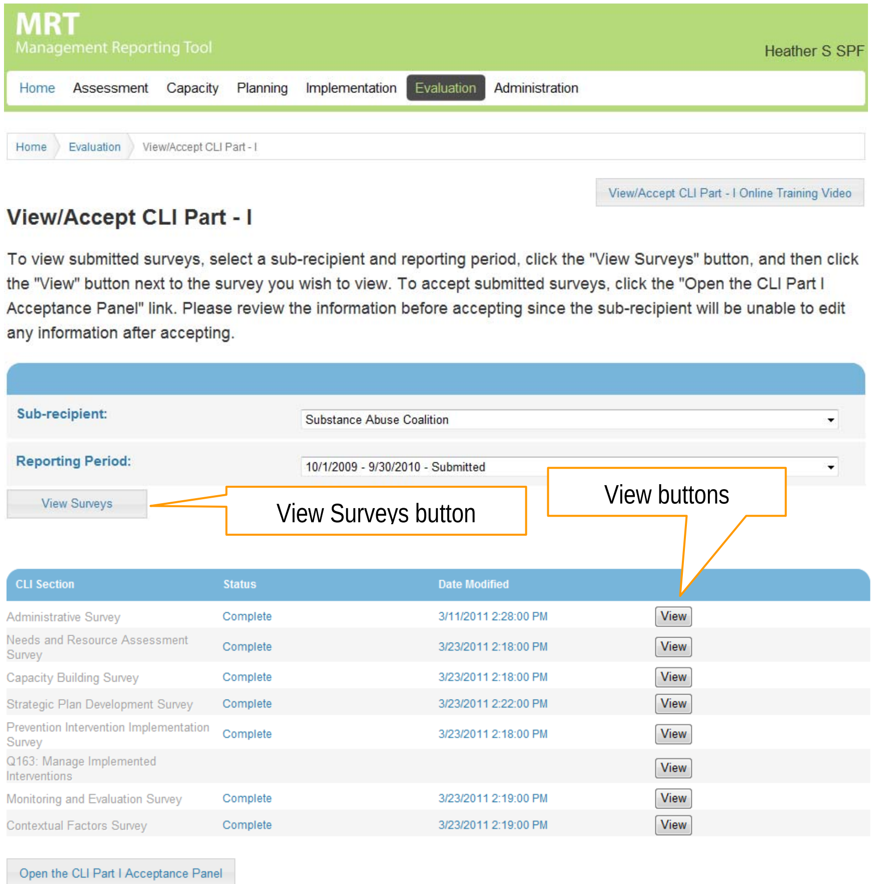
Screenshot displaying the CLI Part II Submission Panel

View/Accept CLI Part – I

The View/Accept CLI Part I module is used to view submitted CLI Part I Sub-recipient surveys to either request revision or accept it.

Viewing a Submitted CLI Part I

1. Click **Evaluation** from the Menu.
2. Click **View/Accept CLI Part - I** from the Evaluation Landing Page.
3. Select the Sub-recipient community name from the **Sub-recipient*** dropdown menu.
4. Select the appropriate reporting period from the **Reporting Period*** dropdown menu.
5. Click the View Surveys (**View Surveys**) button.
6. Click the View (**View**) button to the right of the survey you wish to view.
    a. If you click the View (**View**) button to the right of *Q163: Manage Implemented Interventions*, you will be taken to the **Q163: Manage Implemented Interventions View** Listing Page. Click the name of the Intervention or Strategy Name to view the details.
7. A new window will open displaying the survey.
8. Click the Done (**Done**) button to close the survey window.



Sample screenshot displaying the View/Accept CLI Part I Listing Page

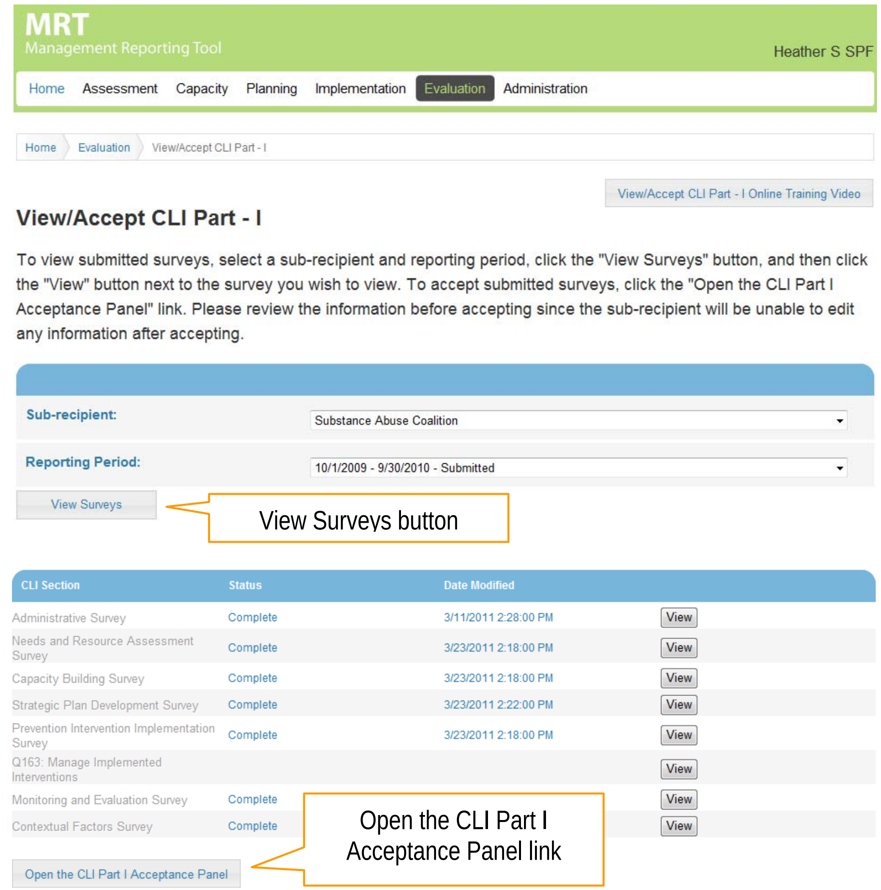
Tips

- You will need to turn off your pop-up blocker in order to open the survey.

Accepting a Submitted CLI Part I

1. Click **Evaluation** from the Menu.
2. Click **View/Accept CLI Part - I** from the Evaluation Landing Page.
3. Select the Sub-recipient community name from the **Sub-recipient*** dropdown menu.
4. Select the appropriate reporting period from the **Reporting Period*** dropdown menu.
5. Click the (**View Surveys**) button.
6. Click the (**Open the CLI Part I Acceptance Panel**) button.

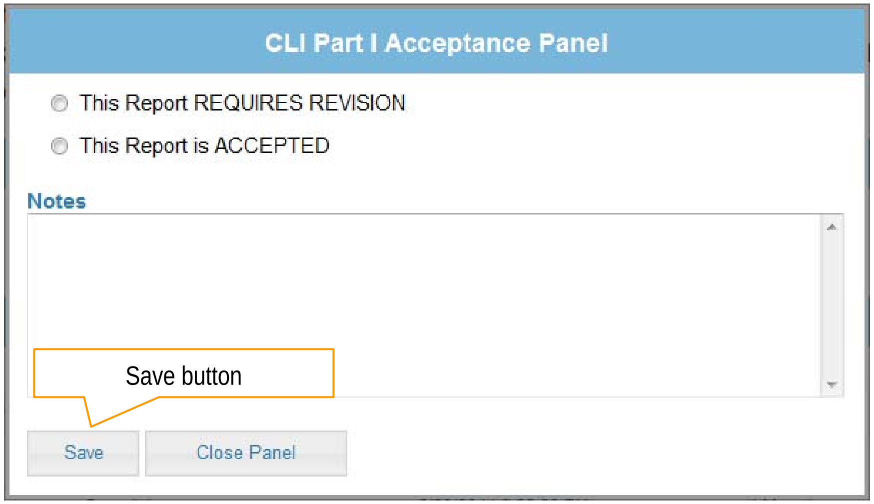
***Note**: Only a user with a role of "Project Director" will have access to the (**Open the CLI Part I Acceptance Panel**) button.



Sample screenshot displaying the View/Accept CLI Part I Listing Page

7. Using the radio buttons, select the acceptance status.
8. If desired, enter any notes needed for the Sub-recipient community in the **Notes** field.
9. Click the Save (**Save**) button.
   *Note: Click the Close Panel (**Close Panel**) button to cancel the acceptance.

*Note: Once the Save (**Save**) button is selected, an email will be sent to the Grantee as well as the Sub-recipient community.



Screenshot displaying the CLI Part I Acceptance Panel

Tips

- If there is no reporting period within the Reporting Period dropdown list, it means the Sub-recipient community has not submitted their CLI Part I yet.
- Once a CLI Part I is accepted, the Open the CLI Part I Acceptance Panel (**Open the CLI Part I Acceptance Panel**) button will no longer be available for the accepted reporting period.

View/Accept CLI Part – II

The View/Accept CLI Part II module is used to view submitted CLI Part II Sub-recipient sub-forms and demographics to either request revision or accept it.

Viewing a Submitted CLI Part II Sub-form Survey

1. Click **Evaluation** from the Menu.
2. Click **View/Accept CLI Part - II** from the Evaluation Landing Page.
3. Select the Sub-recipient community name from the **Sub-recipient*** dropdown menu.
4. Select the appropriate reporting period from the **Reporting Period*** dropdown menu.
5. Click the View Surveys (**View Surveys**) button.
6. Click the **Sub-Form Surveys** tab.
7. Click the View (**View**) button to the right of the sub-form survey you wish to view.
8. A new window will open displaying the sub-form survey.
9. Click the Done (**Done**) button to close the sub-form survey window.

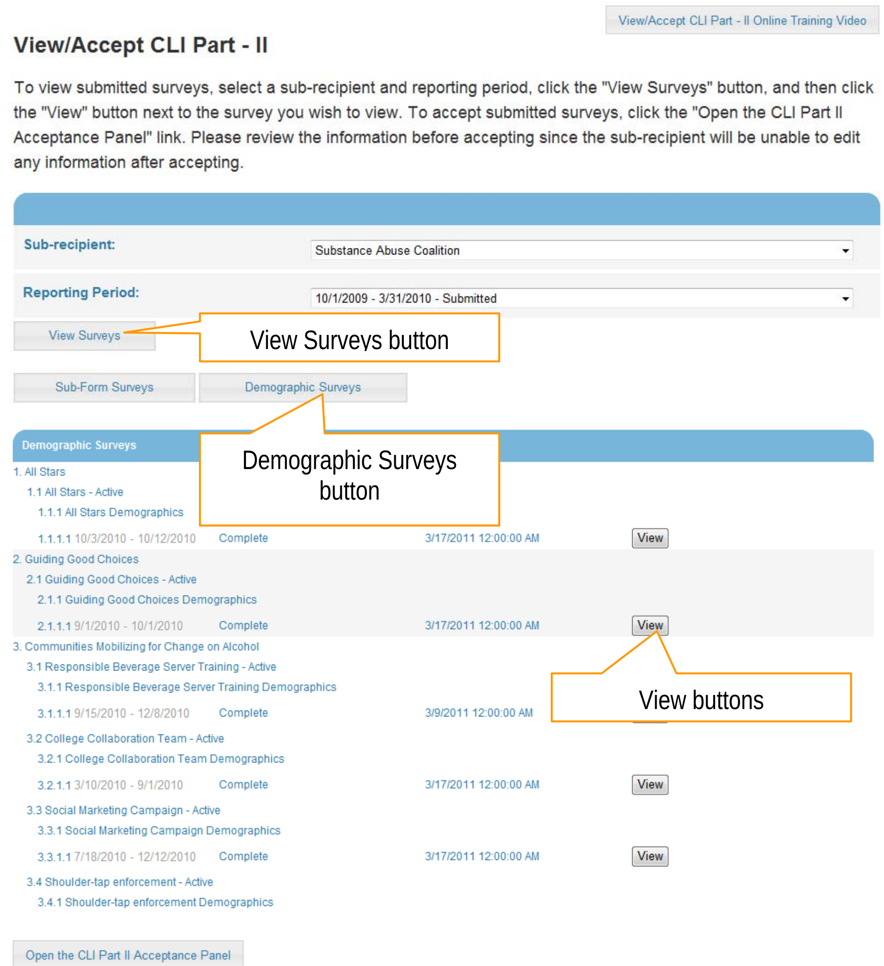
Sample screenshot displaying the View/Accept CLI Part II Listing Page with Sub-Form Surveys selected

Tips

- You will need to turn off your pop-up blocker in order to open the sub-form survey.

Viewing a Submitted CLI Part II Demographic Survey

1. Click **Evaluation** from the Menu.
2. Click **View/Accept CLI Part - II** from the Evaluation Landing Page.
3. Select the Sub-recipient community name from the **Sub-recipient*** dropdown menu.
4. Select the appropriate reporting period from the **Reporting Period*** dropdown menu.
5. Click the (**View Surveys**) button.
6. Click the **Demographics Surveys** tab.
7. Click the (**View**) button to the right of the demographic survey you wish to view.
8. A new window will open displaying the demographic survey.
9. Click the (**Done**) button to close the demographic survey window.



Sample screenshot displaying the View/Accept CLI Part II Listing Page with Demographic Surveys selected

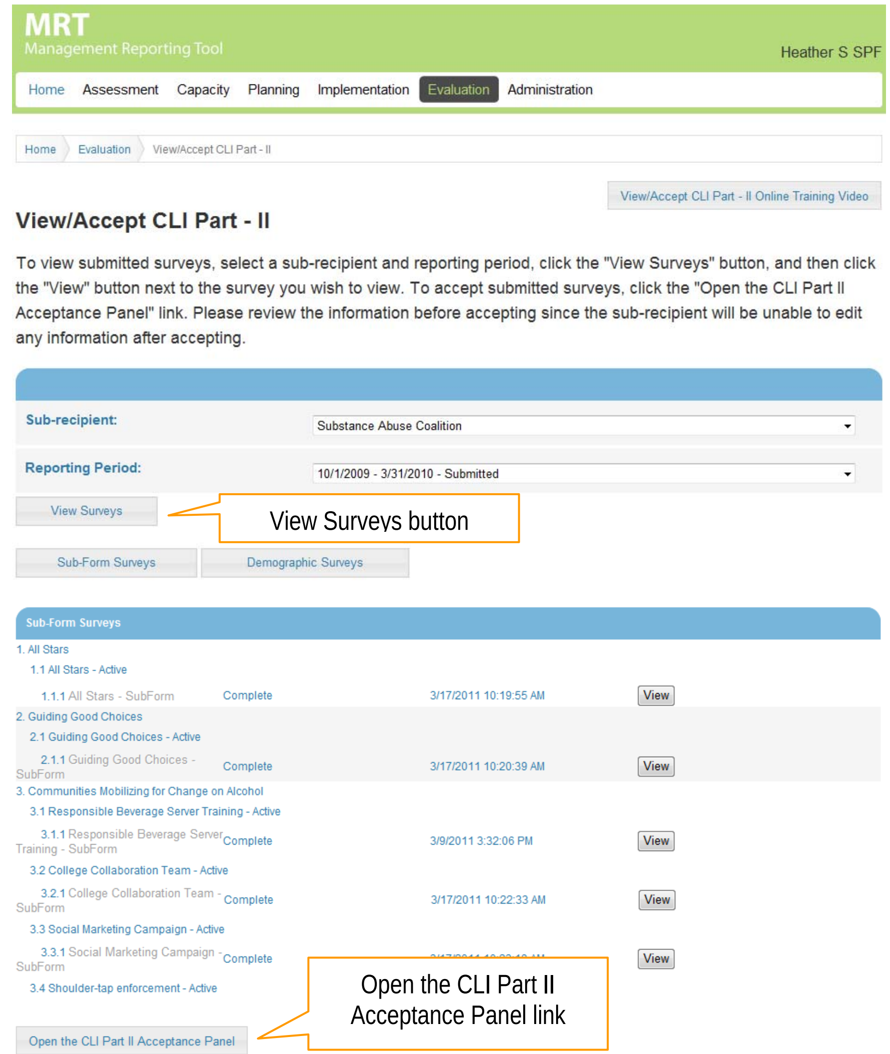
Tips

- You will need to turn off your pop-up blocker in order to open the sub-form survey.

Accepting a Submitted CLI Part II

1. Click **Evaluation** from the Menu.
2. Click **View/Accept CLI Part - II** from the Evaluation Landing Page.
3. Select the Sub-recipient community name from the **Sub-recipient*** dropdown menu.
4. Select the appropriate reporting period from the **Reporting Period*** dropdown menu.
5. Click the View Surveys (**View Surveys**) button.
6. Click the Open the CLI Part II Acceptance Panel (**Open the CLI Part II Acceptance Panel**) button.

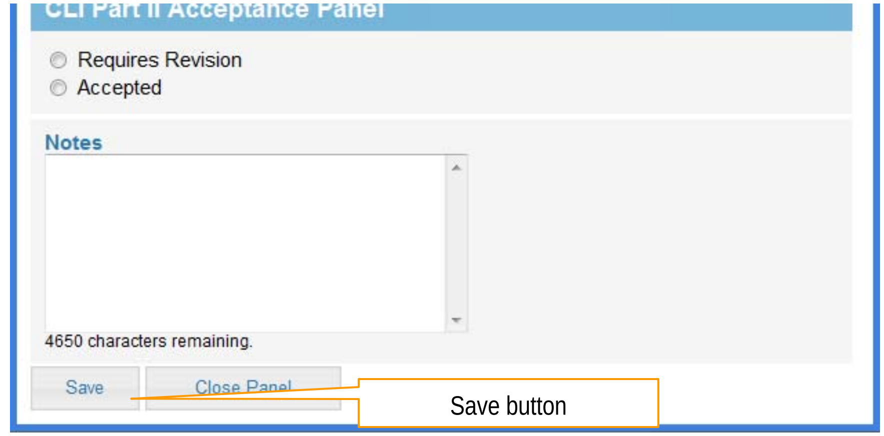
*****Note**: Only a user with a role of “Project Director” will have access to the Open the CLI Part II Acceptance Panel (**Open the CLI Part II Acceptance Panel**) button.



Sample screenshot displaying the View/Accept CLI Part II Listing Page

7. Using the radio buttons, select the acceptance status.
8. If desired, enter any notes needed for the Sub-recipient community in the **Notes** field.
9. Click the (**Save**) button.
   *Note: Click the (**Close Panel**) button to cancel the acceptance.

*Note: Once the (**Save**) button is selected, an email will be sent to the Grantee as well as the Sub-recipient community.



Screenshot displaying the CLI Part II Acceptance Panel

Tips

- If there is no reporting period within the Reporting Period dropdown list, it means the Sub-recipient community has not submitted their CLI Part II yet.
- Once a CLI Part II is accepted, the (**Open the CLI Part II Acceptance Panel**) button will no longer be available for the accepted reporting period.

Participant Level Instrument (PLI)

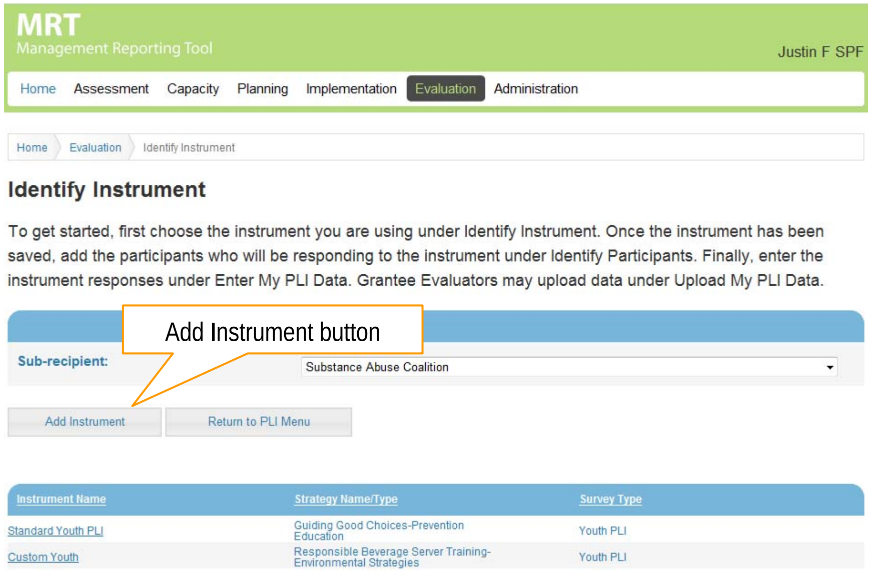
The Participant Level Instrument (PLI) module allows the user to identify the instruments given to participants, identify the participants responding to the survey instruments, and enter the PLI data responses from the individual participants. The PLI Is due every six (6) months.

Identify Instrument

The Identify Instrument module allows the user to identify the instrument used with an implemented strategy name/type from CLI Part I.

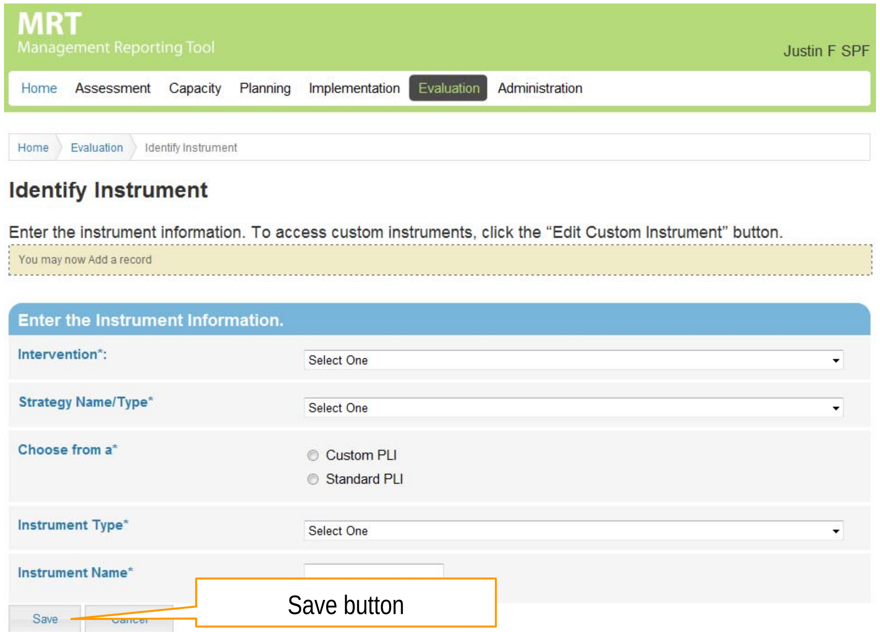
1. Click **Evaluation** from the Menu.
2. Click **Participant Level Instrument (PLI)** from the Evaluation Landing Page.
3. Click **Identify Instrument** from the Participant Level Instrument (PLI) Landing Page.
4. Select the Sub-recipient community name from the **Sub-recipient*** dropdown menu.
5. Click the

(**Add Instrument**) button.



Sample screenshot displaying the Identify Instrument Listing Page

6. Select the intervention name from the **Intervention*** dropdown menu.
*Note: The Intervention list is populated from the interventions that were entered in the [Q163: Manage Implemented Interventions]() section.
7. Select the strategy name from the **Strategy Name/Type*** dropdown menu.
*Note: The Strategy Name list is populated from the strategies that were entered in the [Q163: Manage Implemented Interventions]() section.
8. Select whether the survey instrument will be a ***Custom PLI*** survey or the ***Standard PLI*** survey using the **Choose from a*** radio buttons.
*Note: If *Custom PLI* is selected, see the [Edit Custom Instrument]() section for additional instructions.
9. Select the type of survey instrument from the **Instrument Type*** dropdown menu.
10. If you selected that the survey instrument was a ***Custom PLI***, enter a name for the survey instrument in the **Instrument Name*** text box.
*Note: If you selected that the survey instrument was a *Standard PLI*, the **Instrument Name** will be filled in for you with the Instrument Type name.
11. Click the Save (**Save**) button.
*Note: Click the Cancel (**Cancel**) button to cancel this entry.
12. From the Identify Instrument Listing Page, click the Return to PLI Menu (**Return to PLI Menu**) button.



Screenshot displaying the Identify Instrument Edit Form

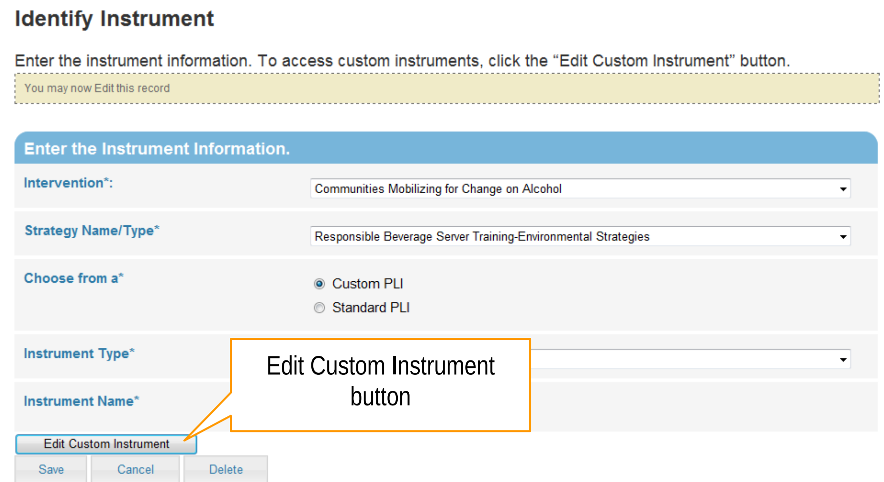
Tips

- There are four (4) unique surveys that can be entered/saved for a strategy name/type: Standard Adult, Standard Youth, Custom Adult, or Custom Youth. You will not be able to enter more than four (4) surveys per strategy name/type.
- The Standard version of the survey contains all of the questions available for that instrument. The Customized survey allows the user to select a particular set of those questions. For example, if the survey the participants completed only included the questions related to Alcohol then the data entry person could Customize the survey to include only the Alcohol questions and remove all of the 30 day use marijuana, tobacco, other drugs, etc questions. This is a good time saver for the data entry person because it allows the online version to look the same as the paper version the participant completed. (Note: All Demographics questions must be included on all surveys; even customized ones.)

Edit Custom Instrument

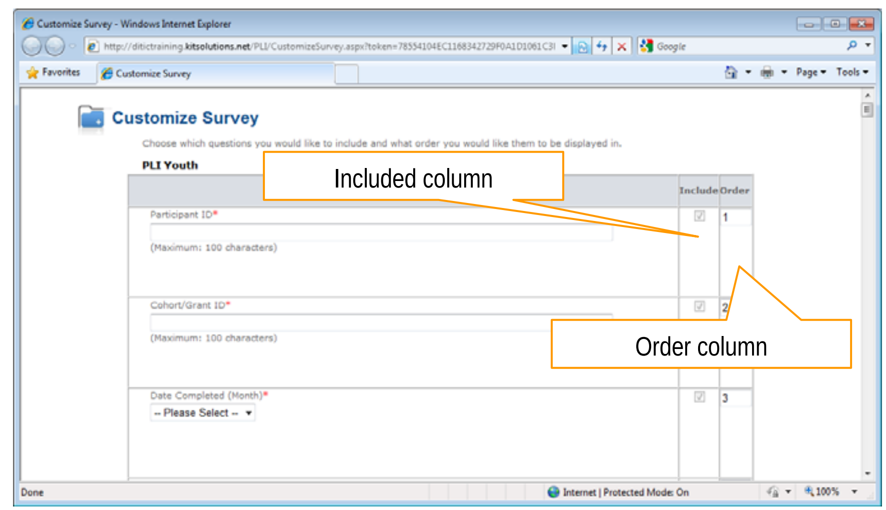
The Edit Custom Instrument button provides the ability to remove and reorder questions on the Standard survey.

1. From the Indentify Instrument Listing Page, select the survey instrument you wish to edit a custom instrument for by clicking the appropriate Instrument Name.
2. Click the Edit Custom Instrument (**Edit Custom Instrument**) button.
   *Note: This button will only be available when the Instrument Name is in edit mode.
3. A new window will open displaying the Standard survey.



Sample screenshot displaying the Identify Instrument Edit Form

4. To exclude a question from the survey, uncheck the checkbox to the right of the appropriate question from the Include column.
   *Note: The first several fields are required for every survey and cannot be removed from the survey. The Include column shows the checkboxes "grayed" out so they cannot be removed.
   a. To include a question into the survey, ensure the checkbox from the Include column is checked.
5. To reorder the questions, enter the appropriate number in the text box to the right of the appropriate question from the Order column.
6. Click the Preview (**Preview**) button to update the survey.
   *Note: The excluded questions will appear at the bottom of the survey. You may still include the questions if need be.
7. Click the Save (**Save**) button.
   *Note: Click the Cancel (**Cancel**) button to cancel this entry.



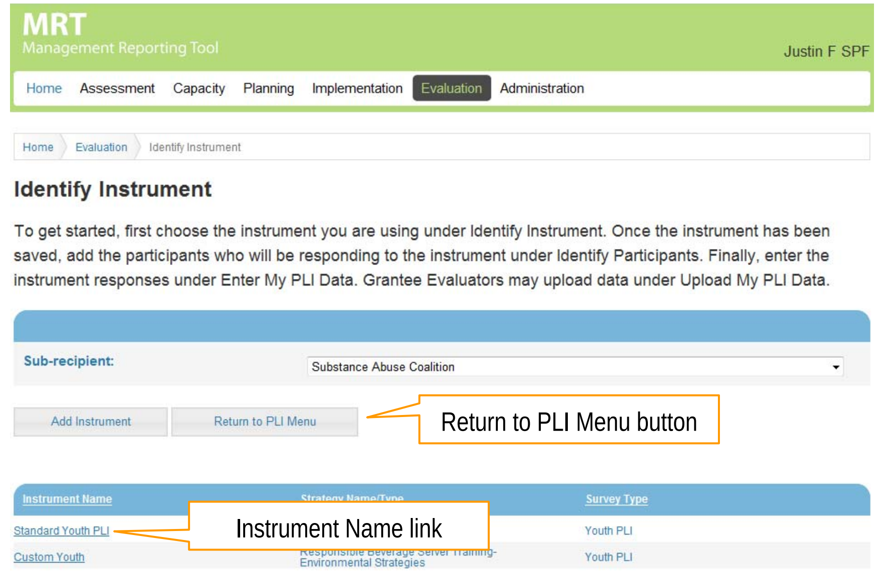
Sample screenshot displaying the Customize Survey Edit Form

Tips

- You will need to turn off your pop-up blocker in order to open the Customize Survey.

Editing an Instrument

1. Click **Evaluation** from the Menu.
2. Click **Participant Level Instrument (PLI)** from the Evaluation Landing Page.
3. Click **Identify Instrument** from the Participant Level Instrument (PLI) Landing Page.
4. Select the Sub-recipient community name from the **Sub-recipient*** dropdown menu.
5. From the Indentify Instrument Listing Page, select the survey instrument you wish to edit by clicking the appropriate Instrument Name.
6. Make any changes needed to the form.
7. Click the Save (**Save**) button.
   *Note: Click the Cancel (**Cancel**) button to cancel this entry.
8. From the Identify Instrument Listing Page, click the Return to PLI Menu (**Return to PLI Menu**) button.

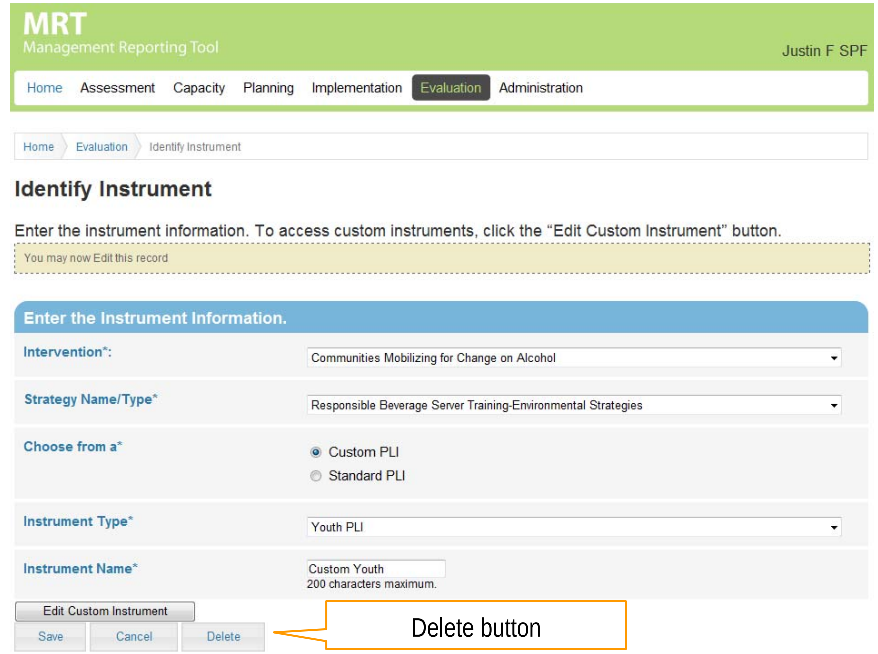


Sample screenshot displaying the Identify Instrument Listing Page

Deleting an Instrument

1. Click **Evaluation** from the Menu.
2. Click **Participant Level Instrument (PLI)** from the Evaluation Landing Page.
3. Click **Identify Instrument** from the Participant Level Instrument (PLI) Landing Page.
4. Select the Sub-recipient community name from the **Sub-recipient*** dropdown menu.
5. From the Indentify Instrument Listing Page, select the survey instrument you wish to delete by clicking the appropriate Instrument Name.
6. Click the Delete (**Delete**) button.

   *Note: Click the Cancel (**Cancel**) button to cancel this entry.
7. The record will be removed from the grid.
8. From the Identify Instrument Listing Page, click the Return to PLI Menu (**Return to PLI Menu**) button.



Sample screenshot displaying the Identify Instrument Edit Form

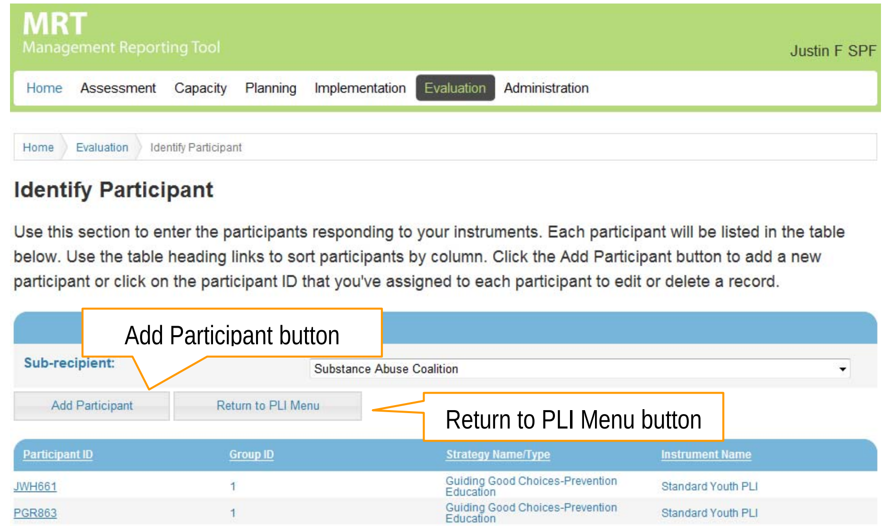
Tips

- Once participant responses are associated with a survey instrument, the instrument information cannot be modified or deleted.

Identify Participant

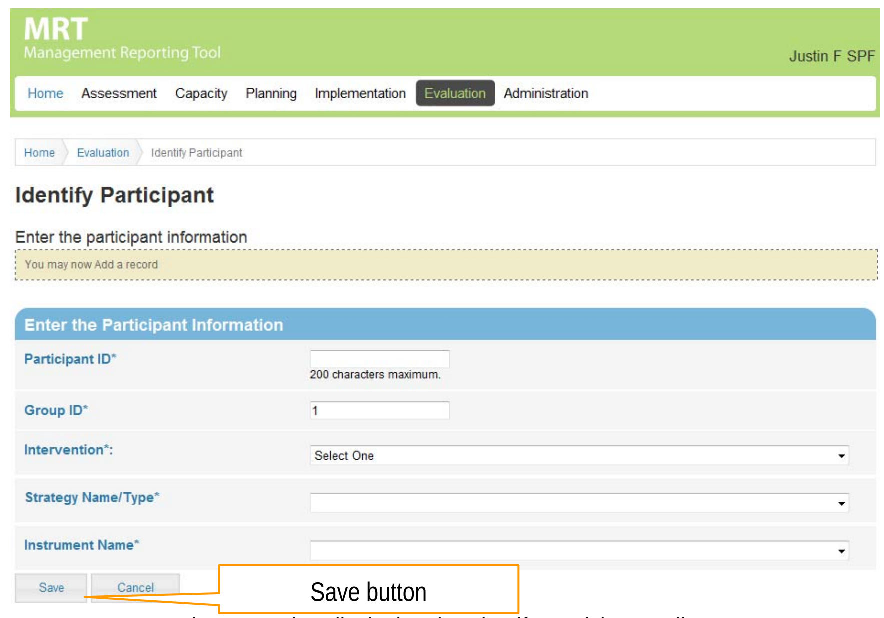
The Identify Participant module allows the user to identify the participants who are responding to the PLI.

1. Click **Evaluation** from the Menu.
2. Click **Participant Level Instrument (PLI)** from the Evaluation Landing Page.
3. Click **Identify Participant** from the Participant Level Instrument (PLI) Landing Page.
4. Select the Sub-recipient community name from the **Sub-recipient*** dropdown menu.
5. Click the Add Participant (**Add Participant**) button.



Sample screenshot displaying the Identify Participant Listing Page

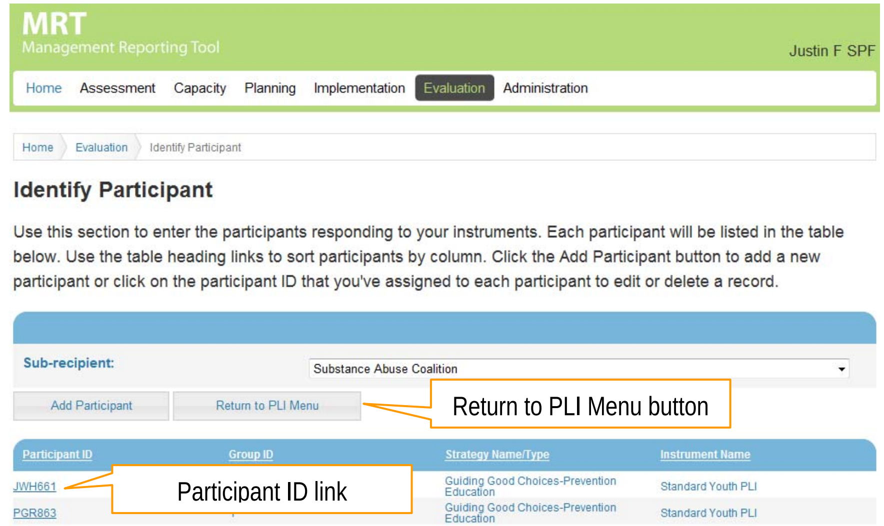
6. Enter the participant identification in the **Participant ID*** text box.
7. Enter the group identification in the **Group ID*** text box.
   *Note: The Group ID is a required field and is defaulted to 1 because not all Grantees/Sub-recipients will use group identification.
8. Select the intervention from the **Intervention*** dropdown menu.
   *Note: The Strategy Name list is populated from the strategies that were entered in the Q163: Manage Implemented Interventions section.
9. Select the strategy name from the **Strategy Name/Type*** dropdown menu.
   *Note: The Strategy Name list is populated from the strategies that were entered in the Q163: Manage Implemented Interventions section.
10. Select the survey instrument from the **Instrument Name*** dropdown menu.
   *Note: If there are no instruments in the dropdown menu, no instruments have been associated with the Strategy Name yet. This can be done using the Identify Instrument form.
11. Click the Save (**Save**) button.
   *Note: Click the Cancel (**Cancel**) button to cancel this entry.
12. From the Identify Participant Listing Page, click the Return to PLI Menu (**Return to PLI Menu**) button.



Sample screenshot displaying the Identify Participant Edit Form

Editing a Participant

1. Click **Evaluation** from the Menu.
2. Click **Participant Level Instrument (PLI)** from the Evaluation Landing Page.
3. Click **Identify Participant** from the Participant Level Instrument (PLI) Landing Page.
4. Select the Sub-recipient community name from the **Sub-recipient*** dropdown menu.
5. From the Indentify Instrument Listing Page, select the participant you wish to edit by clicking the appropriate Participant ID.
6. Make any changes needed to the form.
7. Click the (**Save**) button.
   *Note: Click the (**Cancel**) button to cancel this entry.
8. From the Identify Participant Listing Page, click the (**Return to PLI Menu**) button.

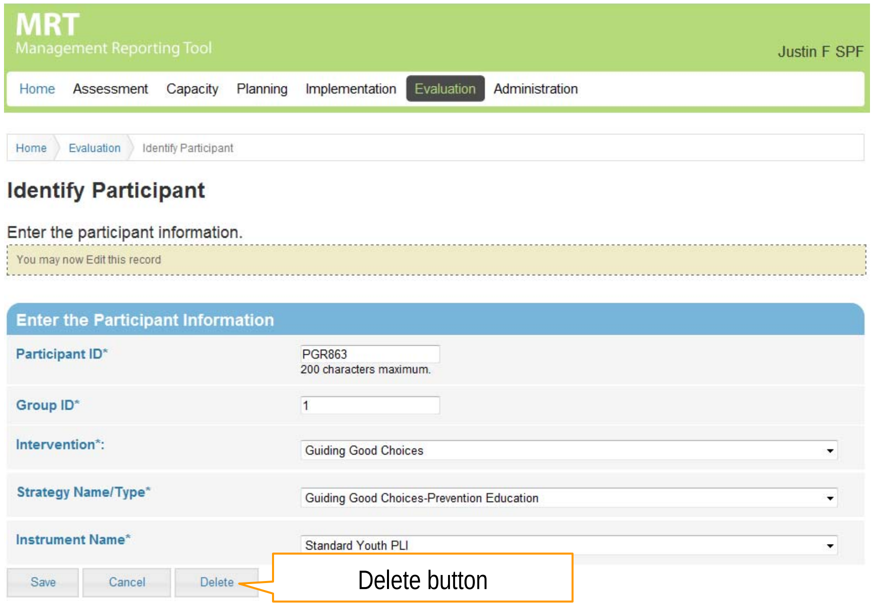


Sample screenshot displaying the Identify Participant Listing Page

Deleting a Participant

1. Click **Evaluation** from the Menu.
2. Click **Participant Level Instrument (PLI)** from the Evaluation Landing Page.
3. Click **Identify Participant** from the Participant Level Instrument (PLI) Landing Page.
4. Select the Sub-recipient community name from the **Sub-recipient*** dropdown menu.
5. From the Indentify Instrument Listing Page, select the participant you wish to delete by clicking the appropriate Participant ID.
6. Click the Delete (**Delete**) button.

   *Note: Click the Cancel (**Cancel**) button to cancel this entry.
7. The record will be removed from the grid.
8. From the Identify Participant Listing Page, click the Return to PLI Menu (**Return to PLI Menu**) button.



Sample screenshot displaying the Identify Participant Edit Form

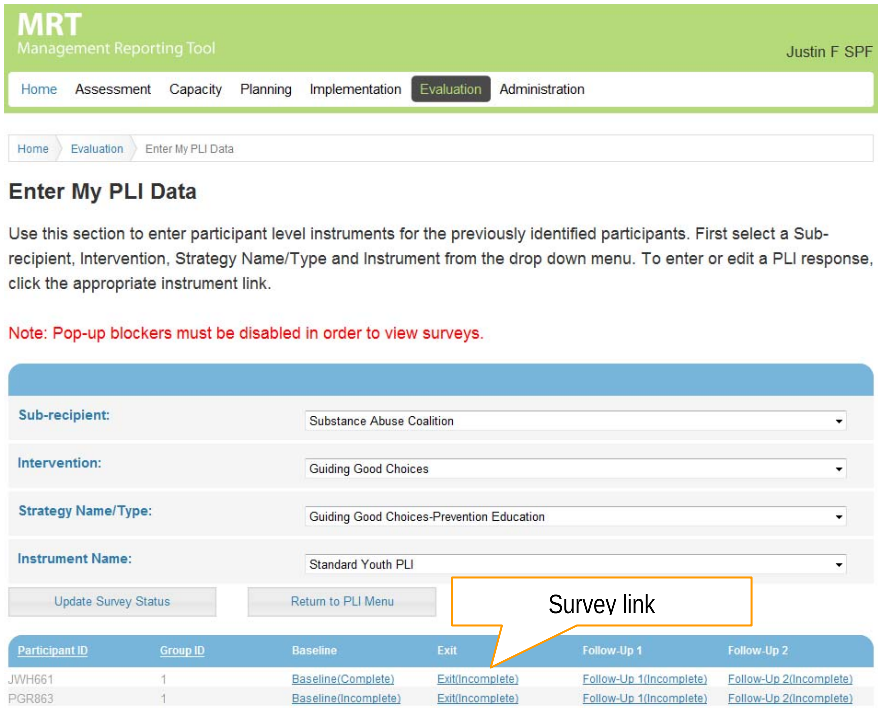
Tips

- Once participant responses are associated with a survey instrument, the participant details cannot be modified or deleted.

Enter My PLI Data

The Enter My PLI Data module allows the user to record the survey instrument PLI data responses from the individual participants.

1. Click **Evaluation** from the Menu.
2. Click **Participant Level Instrument (PLI)** from the Evaluation Landing Page.
3. Click **Enter My PLI Data** from the Participant Level Instrument (PLI) Landing Page.
4. Select the Sub-recipient community name from the **Sub-recipient*** dropdown menu.
5. Select the intervention from the **Intervention*** dropdown menu.
6. Select the strategy name from the **Strategy Name/Type** dropdown menu.
7. Select the survey instrument from the **Instrument Name** dropdown menu.
8. A grid displaying the individual participants associated with the strategy and instrument will display. Click a survey link to the right of the appropriate Participant ID.
9. A new window will open displaying the PLI survey.



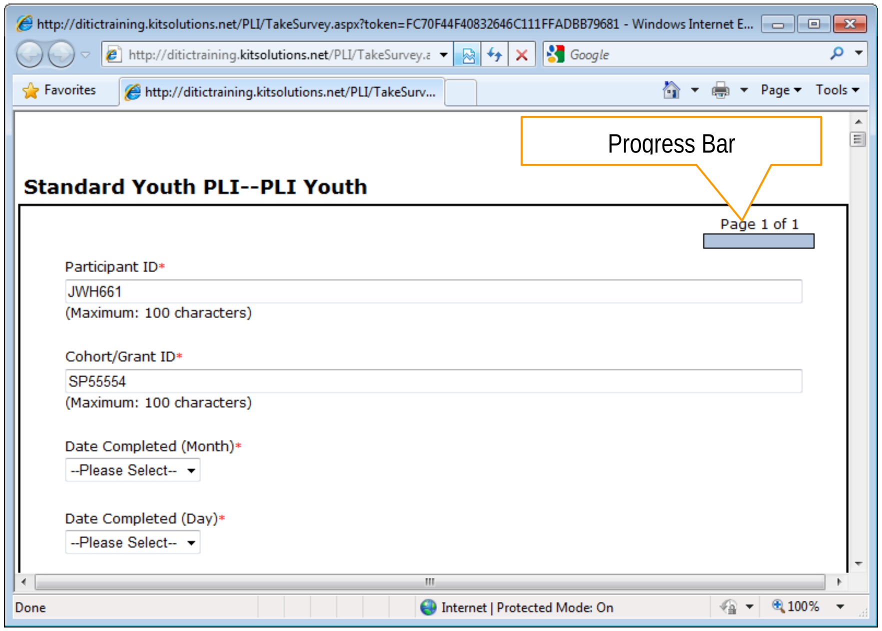
Sample screenshot displaying the Enter My PLI Data Listing Page

Tips

- The system does not force the data entry person to enter the PLI data in order of Baseline to Exit to Follow-up. This is this way for 2 reasons: (1) There is a chance that the data entry might have the stack of Exit PLIs in front of them and so they can enter the Exit ones first and then later add the Baselines. And (2) A participant may have been present for the Exit but not for the Baseline administration; the Exit PLI for that participant can still be entered into the system. – The system is flexible since it is the data entry person completing the information rather than the participant.

10. Answer each question by filling in the appropriate radio button, check boxes, or text field.
11. Once you have answered all the questions, click the (**Done**) button.
    *Note: The final page is to be completed by the Project Director.
12. Click the (**Close**) button to close the window.
13. Click the (**Update Survey Status**) button to display the status of the report (i.e., the report display will go from *Incomplete* status to *Complete* status).
14. From the Enter My PLI Data Listing Page, click the (**Return to PLI Menu**) button.

***Note**: The Progress Bar at the top of each page shows how much of the survey has been completed.



Sample screenshot displaying the PLI Youth Survey

Tips

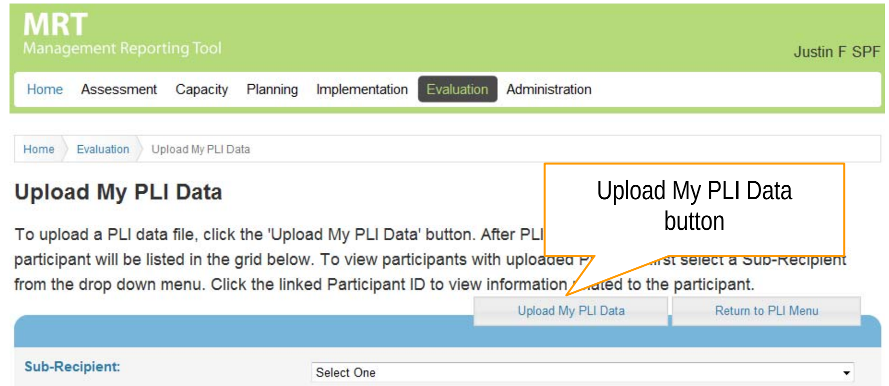
- You will need to turn off your pop-up blocker in order to open the survey.
- If you made a mistake and entered a survey incorrectly, click the (**Delete Reponses**) button. This button is available for completed survey instruments only.
- The *Left Blank* and *Bad Data* options within the survey exist only in the online version. They are responses only the data entry person has and are not options on the paper instrument that the participant completes.
  - If the participant did not provide a response to a particular question the data entry person can still provide a response – by selecting Left Blank. *(This is needed because the questions are required and a response must be selected even if the participant did not provide a response).*
  - If the participant, for example, selected two of the response options rather than just one the data entry person can select "Bad Data".

Upload My PLI Data

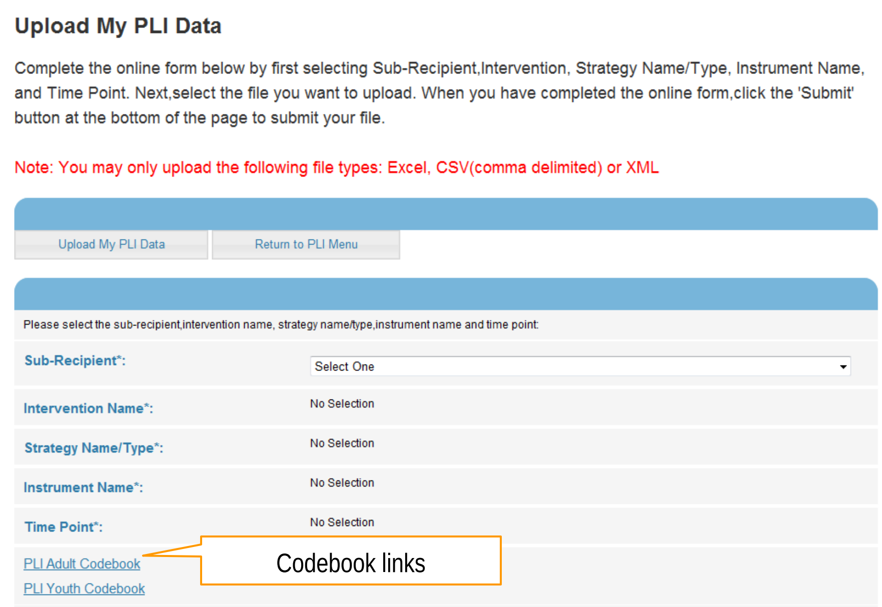
The Upload My PLI Data module allows the user to upload PLI responses using the upload tool. Only the Grantee Evaluator has access to the Upload My PLI Data module.

1. Click **Evaluation** from the Menu.
2. Click **Participant Level Instrument (PLI)** from the Evaluation Landing Page.
3. Click **Upload My PLI Data** from the Participant Level Instrument (PLI) Landing Page.
4. Click the 

(**Upload My PLI Data**) button.



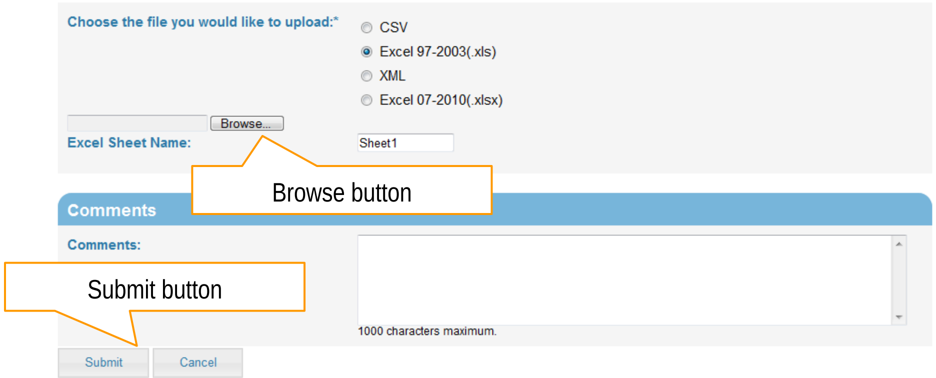
Screenshot displaying the Upload My PLI Data Listing Page



Sample screenshot displaying the Upload My PLI Data Edit Form

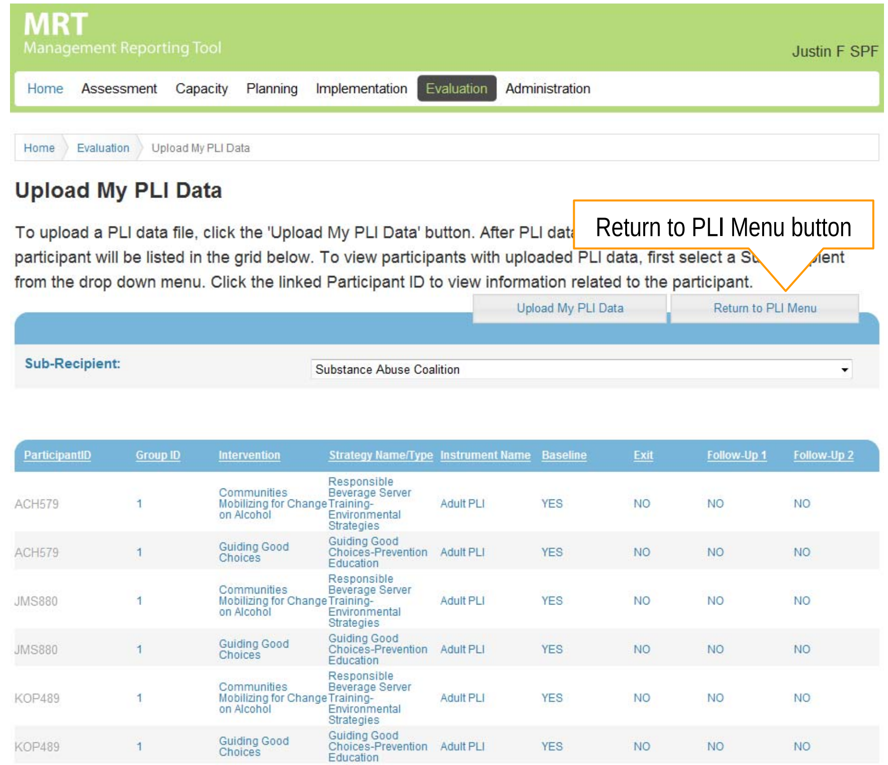
5. Select the Sub-recipient community name from the **Sub-Recipient*** dropdown menu.
6. Select the intervention name from the **Intervention Name*** dropdown menu.
7. Select the strategy name from the **Strategy Name/Type*** dropdown menu.
8. Select the survey instrument from the **Instrument Name*** dropdown menu.
9. Select the instrument type from the **Time Point*** dropdown menu.
10. Links to the survey instrument templates and codebooks are available. Use the templates and codebooks to create your upload file.

11. Using the radio buttons, select the upload file type.
12. To upload a file, perform the following steps:
    a. Click the (**Browse**) button.
    b. Select the document you wish to upload from the **Choose File** window and click the (**Open**) button.
    c. The file path will appear in the **Choose the file you would like to upload:*** text box.
        i. If *Excel 97-2003(.xls)* or *Excel 07-2010* is selected as the file format, a new field will appear: **Excel Sheet Name**. Enter the sheet name in the text box.
        *Note: The excel sheet refers to the tabs located at the bottom of an excel spreadsheet. This field is defaulted to say *Sheet1*.
13. Click the (**Submit**) button.
    *Note: Click the (**Cancel**) button to cancel this entry.



Sample screenshot displaying the Upload My PLI Data Edit Form with Excel 97-2003(.xls) selected – this is a partial screenshot

14. Once an upload file is submitted, a grid will appear displaying the records that were uploaded. To view a list of records, select the Sub-Recipient community from the **Sub-Recipient** dropdown list.
15. From the Upload My PLI Data Listing Page, click the (**Return to PLI Menu**) button.



Sample screenshot displaying the Upload My PLI Data Edit Form

Tips

- You will not be able to modify an uploaded file.
- If something in the upload file does not match a variable or value in the Codebook then the user receives an “Oops!” message and also an Error Report. The Error Report opens in a new window which the Grantee Evaluator can print/save and then use to correct the file and make it match the Codebook. Once all corrections are made the Grantee Evaluator can then upload the file.

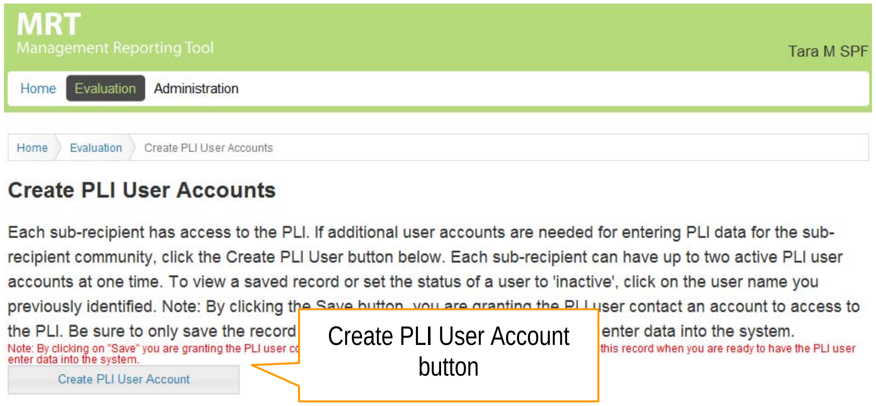
Create PLI User Accounts

Each Sub-recipient has access to the PLI. The Create PLI User Accounts module allows the Sub-recipient community to add additional user accounts if additional members are needed to enter PLI data for the Sub-recipient community. Each Sub-recipient community can have up to two (2) active PLI user accounts at one (1) time.

Adding a PLI User Account

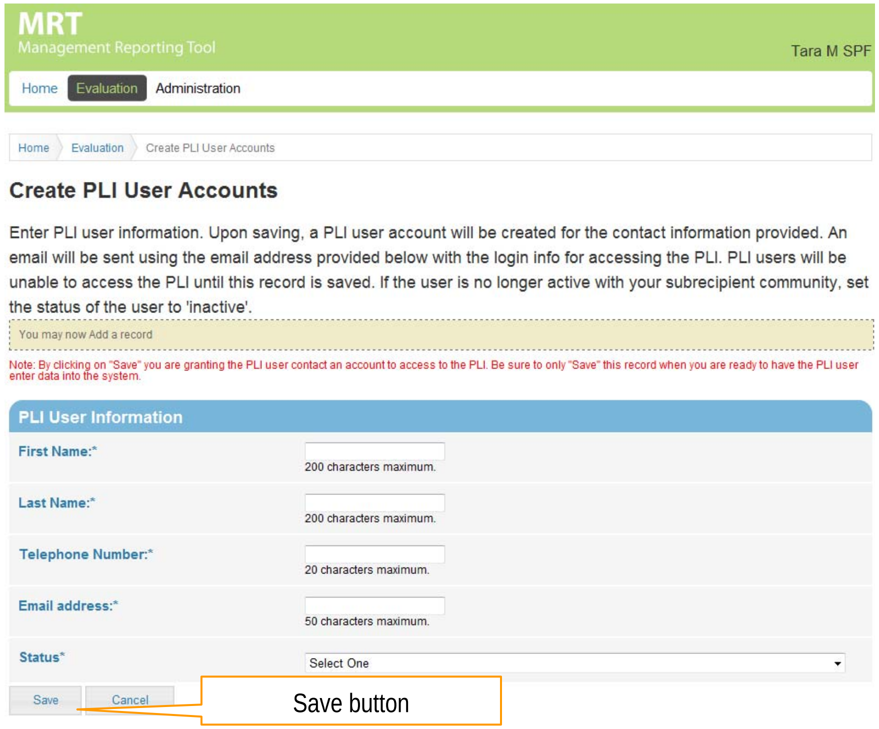
1. Click **Evaluation** from the Menu.
2. Click **Create PLI User Accounts** from the Evaluation Landing Page.
3. Click the 

 (**Create PLI User Account**) button.



Screenshot displaying the Create PLI User Accounts Listing Page

4. Enter the user's first name in the **First Name*** text box.
5. Enter the user's last name in the **Last Name*** text box.
6. Enter the user's telephone number in the **Telephone Number*** text box.
7. Enter the user's email address in the **Email address*** text box.
8. Select the status of the user using the **Status*** radio buttons.
    a. *Active*: currently entering PLI data
    b. *Inactive*: no longer entering PLI data
9. Click the (**Save**) button.
   *Note: Click the (**Cancel**) button to cancel this entry.



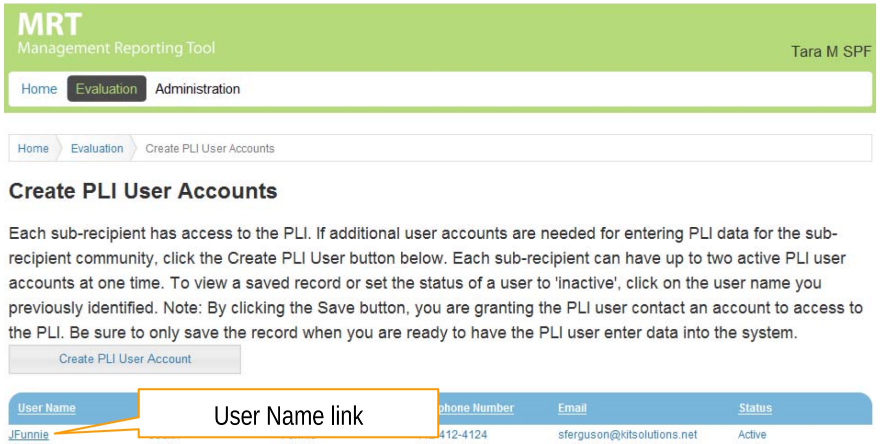
Screenshot displaying the Create PLI User Accounts Edit Form

Tips

- Once the Create PLI User Accounts form is saved, an email with login information will be sent to the user.

Editing a PLI User Account

1. Click **Evaluation** from the Menu.
2. Click **Create PLI User Accounts** from the Evaluation Landing Page.
3. From the Listing Page, select the user account you wish to edit by clicking the appropriate User Name.
4. Make any changes needed to the form.
5. Click the (**Save**) button.
   *Note: Click the (**Cancel**) button to cancel this entry.



Sample screenshot displaying the Create PLI User Accounts Listing Page

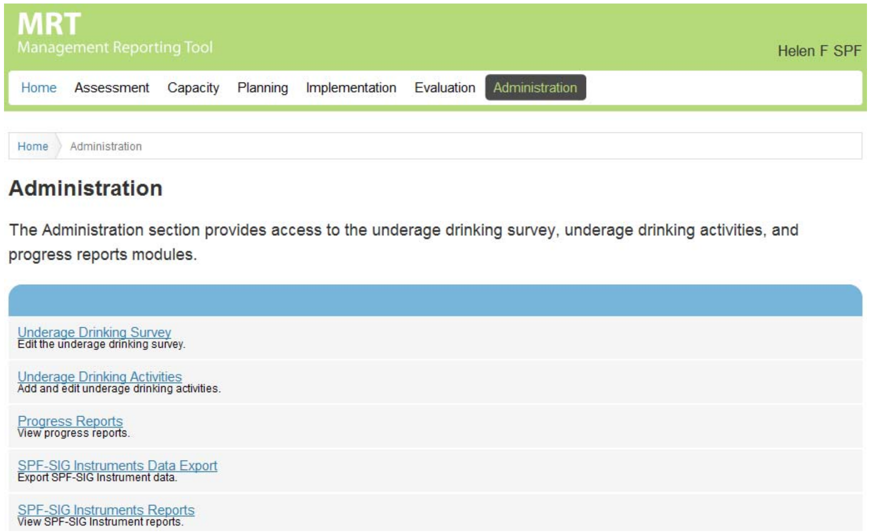
Tips

- The **First Name** and **Last Name** fields may not be modified.
- If a user is no longer entering the PLI data, set the **Status** to ***Inactive***.
- Once a user is set to ***Inactive*** **Status**, you will no longer be able to modify the account details.

ADMINISTRATION

Within the Administration module, a user is able to perform the following tasks:

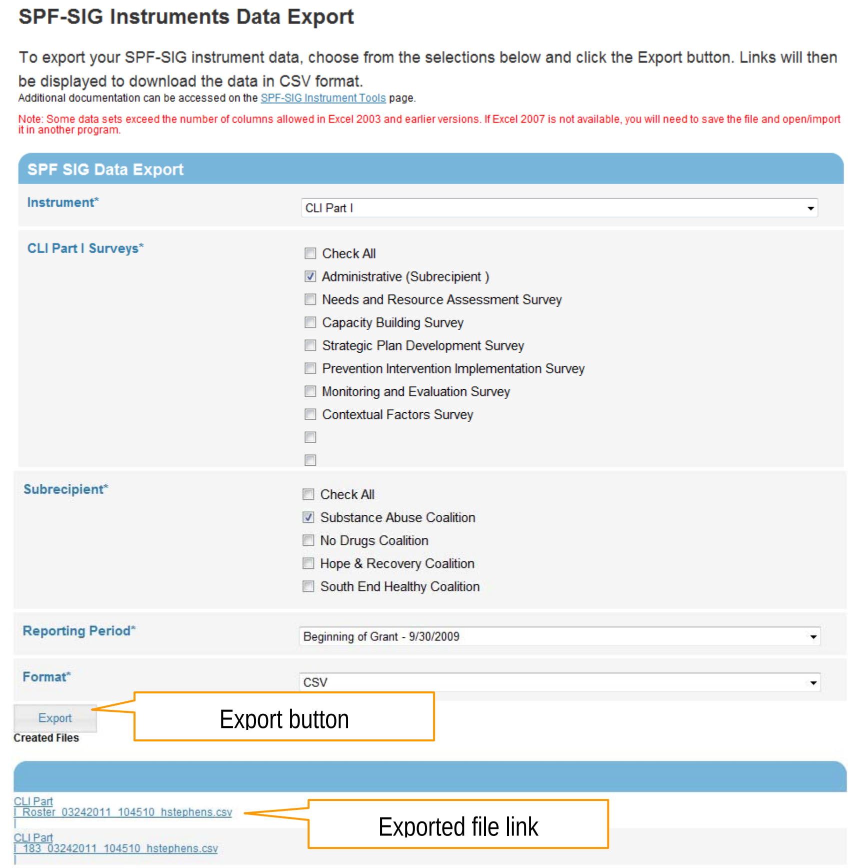
1. SPF-SIG Instruments Data Export.
2. SPF-SIG Instruments Reports.



Screenshot of the Administration Landing Page

SPF-SIG Instruments Data Export

The SPF-SIG Instruments Data Export module allows the user to export their GLI and sub-recipient CLI data in raw format.



Sample screenshot displaying the SPF-SIG Instruments Data Export

Using the Data Export

1. Select the instrument you would like to view from the **Instrument*** dropdown list.
   a. If CLI Part I or CLI Part II is selected, new fields will appear.
      i. Use the checkboxes to select the **CLI Part I Surveys** * you wish to view.
      ii. Use the checkboxes to select the **Sub-recipient*** you wish to view.
2. Select the appropriate reporting period from the **Reporting Period*** dropdown menu.
3. Select the format you wish to export this data into from the **Format*** dropdown menu.
4. Click the Export (**Export**) button.
5. A link to the exported file will appear under **Created Files**. Click the link to open the file.

Tips

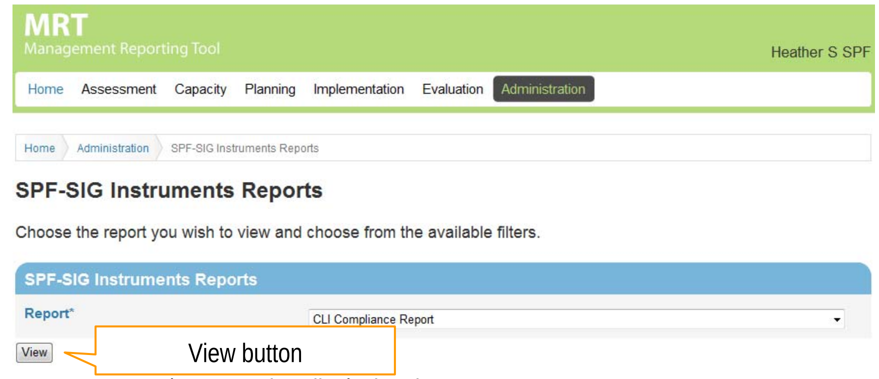
- Some data sets exceed the number of columns allowed in Excel 2003 and earlier versions. If Excel 2007 is not available, you will need to save the file and open/import it in another program.
- Click the SPF-SIG Instrument Tools (**SPF-SIG Instruments Tools**) link to access additional documents that will be helpful when using the SPF-SIG Instruments Data Export.

SPF-SIG Instruments Reports

The SPF-SIG Instruments Reports module allows the user to view several SPF-SIG Instrument reports.

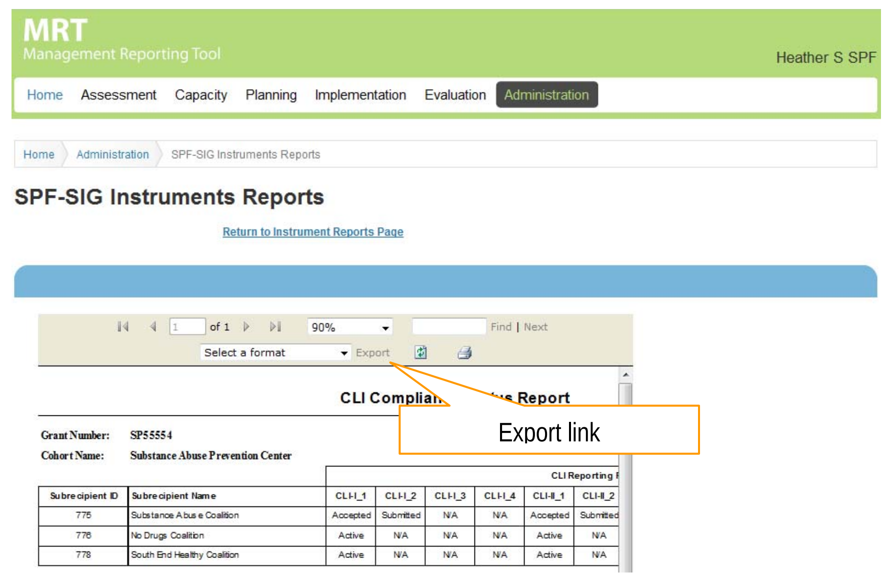
Viewing a Report

1. Select report you would like to view from the **Report*** dropdown list.
    a. Depending on the report selected, new fields may appear.
2. Click the View (**View**) button.
3. A new window will open displaying the selected report.



Sample screenshot displaying the SPF-SIG Instruments Data Export

4. Click the (arrows) to maneuver to other pages in the report.
    a. To move to a specific page within the report, type a page number into the text box and click the **Enter** button on your keyboard.
5. The dropdown menu can be used to change the level of magnification of the report.
6. To find a specific word or phrase, enter it into the **Find** text box and click the Find (**Find**) link.
    a. Click the Next (**Next**) link to be taken to the next instance of the word or phrase.
7. To print or save the report you will have to download the report.
    a. To download the report, select the type of file you want from the **Select a format** dropdown menu and click the Export (**Export**) link.
8. Click the Return to Instrument Reports Page (**Return to Instrument Reports Page**) link.



Sample screenshot displaying a Progress Report view screen – this is a partial screenshot